WORKDAY
our way

Workday Resource Guide

https://collabtools.sharepoint.com/sites/THG-LearnDev/SitePages/WorkdayTraining.aspx

The Heritage Group

A MEMBER OF THE HERITAGE GROUP FAMILY · EST. 1930

Table of Contents

WORKDAY our way

Go Live Checklist

Ready for Workday? After September 15th, complete this checklist when you login to be set up for success.

- ## Review Personal Information

Review Contact Information (Including **email**, address and phone number)

- ☐ Go to **Menu**, then **Personal Information**, then **Contact Information.**
- ☐ To update, click **Edit**, select the **Pencil Icon**, update your information and click **Submit**.

Update Emergency Contacts

- ☐ Go to **Menu**, then **Personal Information**, then **Emergency Contacts**.
- ☐ To update, click **Edit**, select the **Pencil Icon**, update your information and click **Submit**.

- ## Add In Your Absence (Time Off) Requests for Hourly Workers

Your requested and approved absence requests will not automatically carry over to Workday. Please enter them on Day 1.

- ☐ Go to **Menu**, then **Absence,** then **Request Absence.**
- ☐ Check your available balances by checking balances. To see what you will have in a future date, update the date in the **Balance as Of** field.
- ☐ Click the day(s) you want off, then the orange **Request Absence** button.
- ☐ Enter the **Type of Time Off** and click **Next**.
- ☐ Review your request and click **Submit**. It will route to your manager for approval. You will receive a notification when it is approved, denied or sent back.

- ## Check (Clock) In and Out for Hourly Workers

- ☐ **Check In**: Go to **Menu**, then Time, then **Check In**. The **Check In** button is also on the Workday Home Page Quick Tasks. The system defaults to regular hours and your primary work location. If this is correct**.** Click **OK.**
- ☐ **Check Out:** Go to **Menu**, then **Time**, then **Check Out**. The **Check Out** button is also on the Workday Home Page Quick Tasks. The system defaults to regular hours and your primary work location. If this is correct**.** Click **OK.**
- ☐ **Submit Your Time** at the end of each week. Go to **Menu,** then **Time,** then **This Week.** Click **Review**, review your hours and click **Submit**. If you miss a punch, contact your timekeeper, supervisor or manager to correct it.

Dormakaba Time Clock

- Swipe your badge or enter your badge number and click **OK**. For those without a badge enter your Workday ID (your current employee ID with a 1 in the front). For Monument Texas, use your fingerprint on the biometric reading scanner.
- Select your clock type (**Clock in, Clock Out, Meal Start, Meal Stop**), then click **OK**.
- **Submit Your Time** in Workday at the end of each week. Go to **Menu,** then **Time,** then **This Week.** Click **Review**, review your hours and click **Submit**.
- If you miss a punch, contact your timekeeper, supervisor or manager to correct it.

• Approve Time and Absence For Managers of Hourly Workers

Approve Timecards

- Go to My Tasks on the homepage to review the time entries for approval. You'll receive an individual notification when a worker submits their timecard.
- Review the time entries for each day and the weekly summary.
- To approve the submitted time, click **Approve**.
- Once you approve a worker's time and see the confirmation message, the information has been sent to payroll for processing.

Correct or Add a Missed Time Entry

- Go to **Menu**, then **Team Time and Absence,** then **Enter Time for Worker**.
- Enter in worker name, the date of the correction and click **OK.**
- The employee's timecard displays. Click the **Actions** button. To add or correct time worked, select **Enter Time**.
- Select the day of the week to edit. Add the missed Clock In and Clock Out information. For multiple time entries on a single day, click the + button to add time and/or click the – button to remove an incorrect entry. Click the **OK** button. The time has been recorded on the timecard.

Approve, Send Back or Deny Time Off Requests

- When employees submit a Time Off Request, the Absence Request notification will appear in your Awaiting Your Action section on the homepage. Click on **Absence Request**.
- To view the worker's Time Off balances, click the **View Balances button**. This will provide balances to any Time Off plans the employee is eligible for. If desired, add feedback/comments in the Comments box.
- **Click the Approve button.** The employee will receive a notification that the request is approved and their Absence calendar will update. If you choose to Send Back or Deny the request, add your feedback in the Comments section so the employee understands why their request wasn't approved. To modify the request, **click the Send Back button**. The employee will receive a notification with your instructions to modify their request before submitting it for approval again. **Click the Deny button** if you are rejecting the request. This may be used if others are already taking time off during that timeframe, a high demand period, or the employee has resigned and is asking for time off during their notice period.

I. Login

Choose How You Log In to Workday

Workday can be accessed on site, while working remotely or through the mobile app. Here's how to do each.

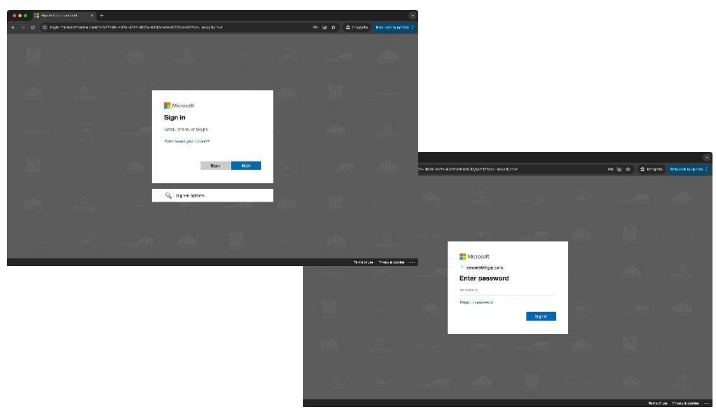
Log In While On Network

When you're on the company network, follow these steps:

1. Sign in to your work computer using your Microsoft credentials. (If you're not sure what your credentials are, reach out to your leader or ITSS.) If you are using a kiosk, you may have to sign in to the kiosk first.

2. Once signed in, click the Workday icon on your desktop. You're all set!

Log In While Off Network

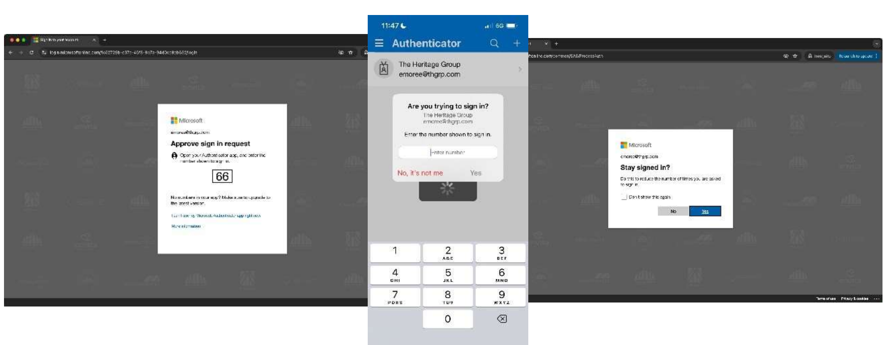


If you're working remotely, you'll follow the steps above with the additional step of using the Microsoft Authenticator app to verify your identity:

1. Enter work email and network password. If you don't have a work email account, use your employee ID number.

2. Verify the identity code in the Authenticator App. Click the "Don't show this again" box, and then Yes if it is on a personal device. Click "No" if on a shared device.

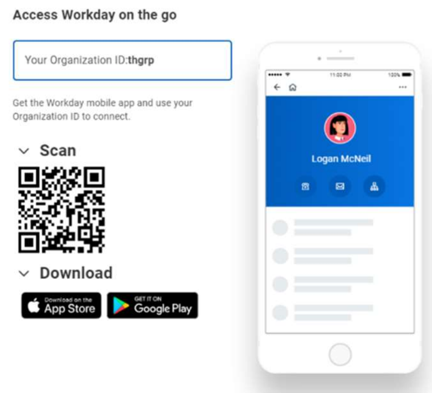
3. If you need help with Microsoft Authenticator, review article KB0015003.



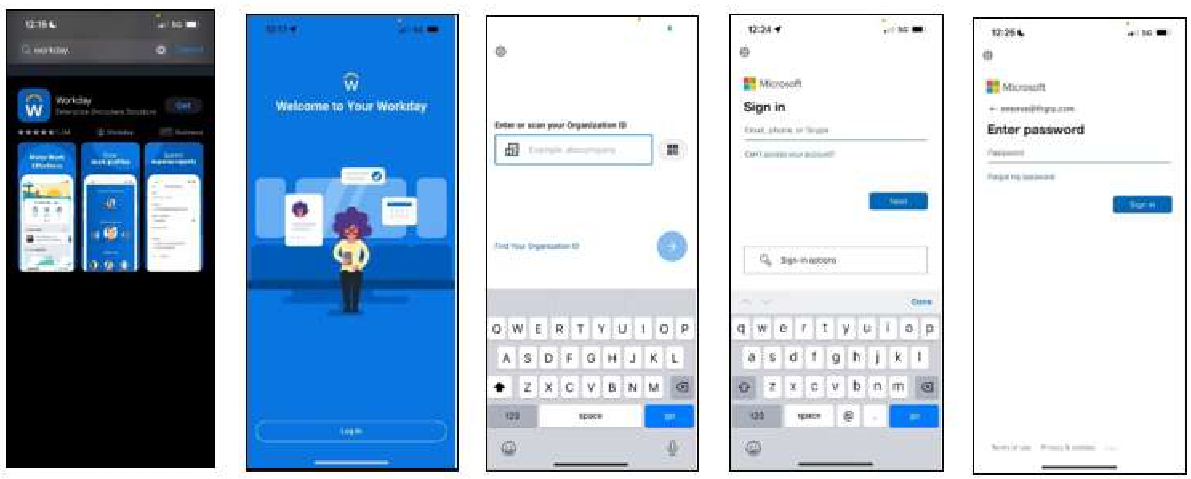
Look for the Workday icon on your desktop or kiosk. Or use this URL to go to the Workday Log In: ***https://rebrand.ly/go-to-workday***

Log In to the Workday Mobile App

You can also log in to Workday using their convenient mobile app. Just follow these steps to get started:

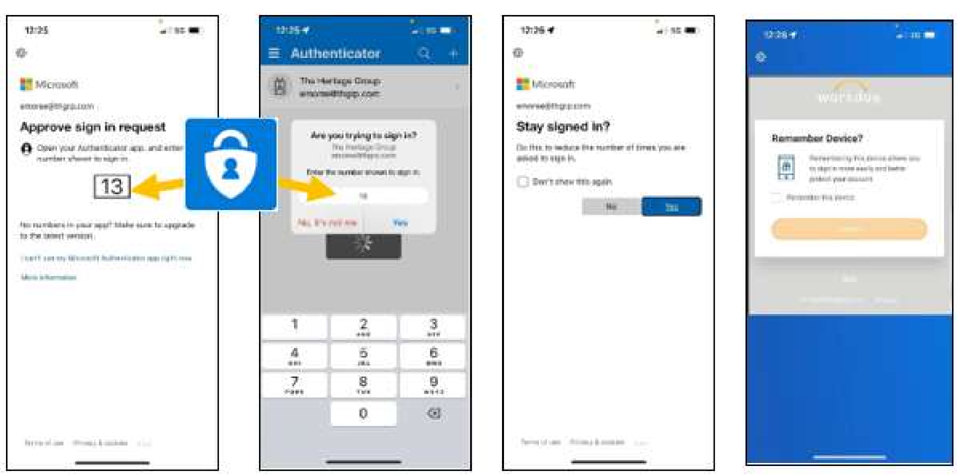


STEP 1 | STEP 2 | STEP 3 | STEP 4 | STEP 5



Download Workday from App Store | *Click Log in* | *Enter 'thgrp' as your Organization ID* | *Enter Email* | *Enter Password*

STEP 6 | STEP 7 | STEP 8 | STEP 9



Enter # shown in Microsoft Authenticator | *Click Yes* | *Click "Don't Show Again" then Yes* | *Click "Remember this device" and then Submit*

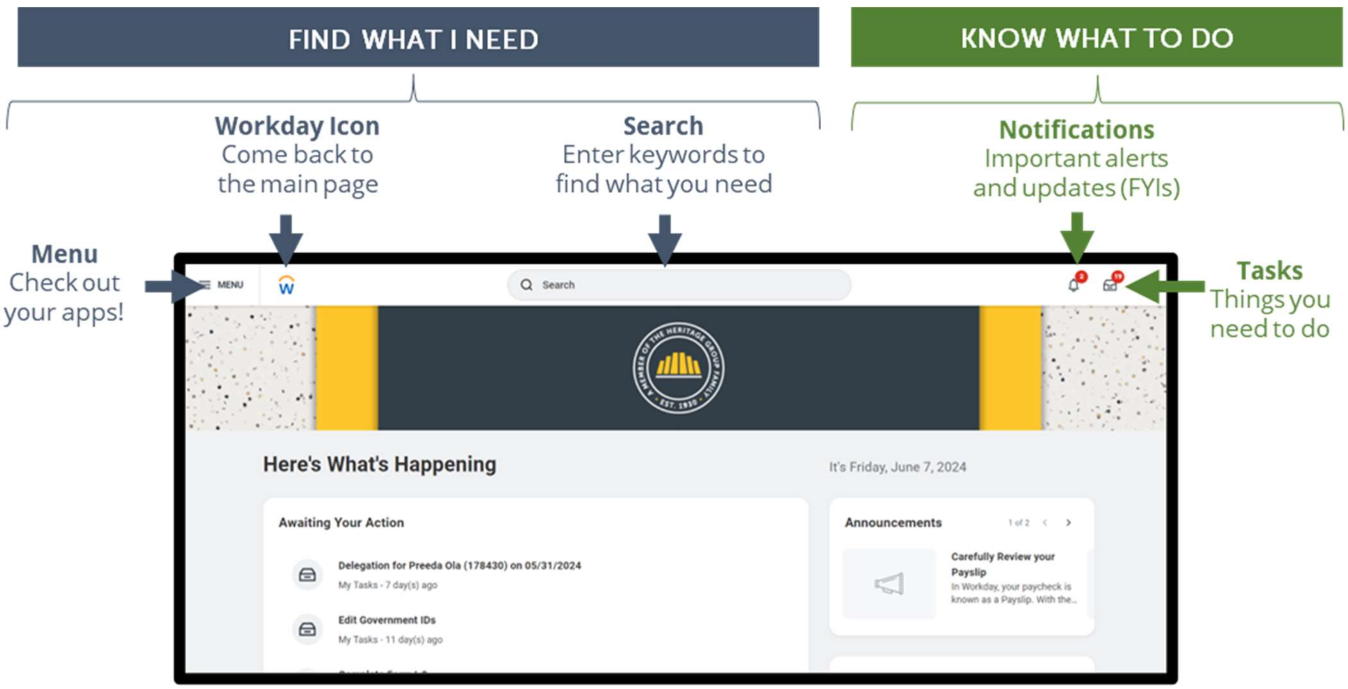
II. Where To Go For Help

A. Who To Go To For Help

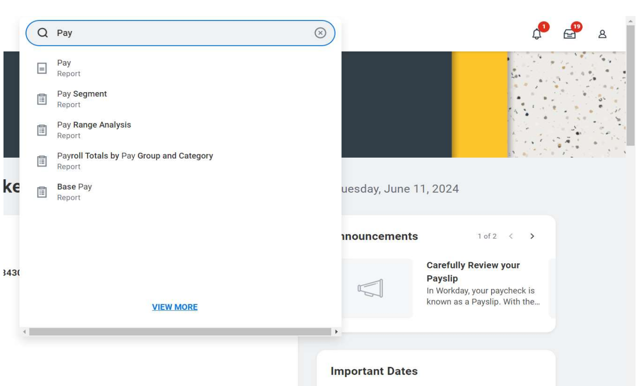
- Contact your HR Department or
- Employee Hub at EmployeeHub@thgrp.com or 800-303-0408

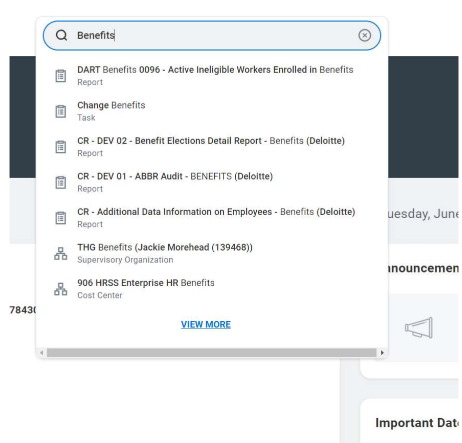
B. How to Navigate Workday

1. **How to Navigate:** Workday is really easy to use, and there are many ways to find what you need and what to do. Let's cover how to find what you need by reviewing the menu, Workday Icon button, and Search bar.



2. **The Search Bar:** In the center of the top bar, you'll find the Search Bar. This helps you find exactly what you need. Just type in keywords and helpful links or articles will show up to help guide you. For example, type in "pay" for payment options or "benefits" for benefits information.





3. **Tasks and Notifications**

Notifications (Your Alerts)

- ✓ Like a nudge or reminder about something in Workday
- ✓ Updates about info, like when a report is ready, or your time off has been approved
- ✓ **What to do when you get these:** You read these to stay updated, but you usually don't have to do anything with them

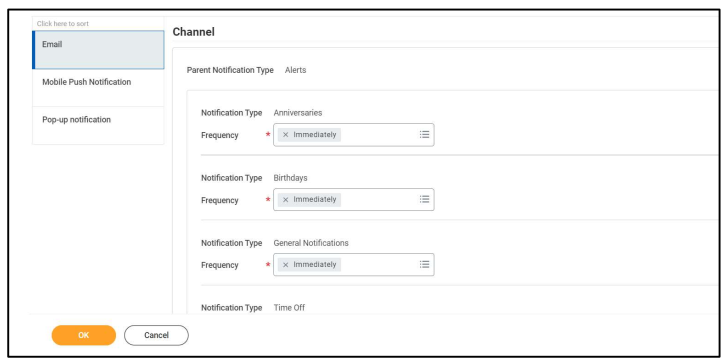
My Tasks (Your To Do List)

- ✓ Like a mailbox for your tasks in Workday
- ✓ Tasks require **action**, like enrolling in benefits or approving time off
- ✓ **What to do when you get these:** Click on the item and finish the task

4. **Email Notifications**

   You will receive an email when you get a Workday notification. With Workday, you can update your preferences to receive emails immediately (the default), or daily.

   1. Click the Profile Picture
   2. Click **My Account**
   3. Click **Change Preferences**
   4. Go to the **Channel** section
   5. The default frequency is Immediately. Click the box to change to Daily (do not use mute).



C. The Help Center in Workday

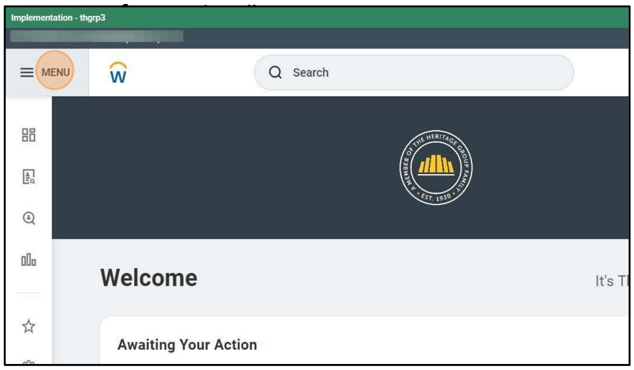
Knowledge articles are there to assist you with "how to" information on how to complete tasks. To get to the Help Center:

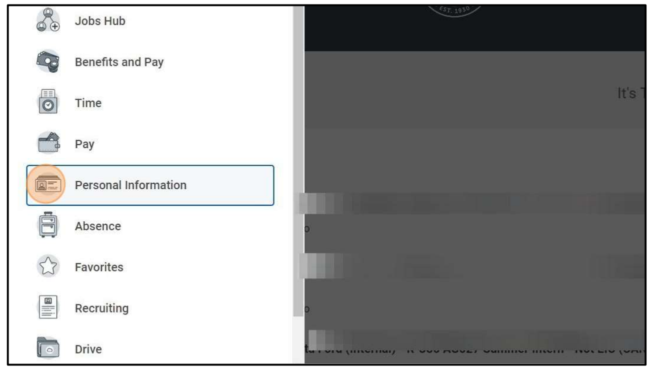
1. Go to Menu > Help, or
2. Use keywords in the Search Box to bring up relevant knowledge articles

III. Personal Information

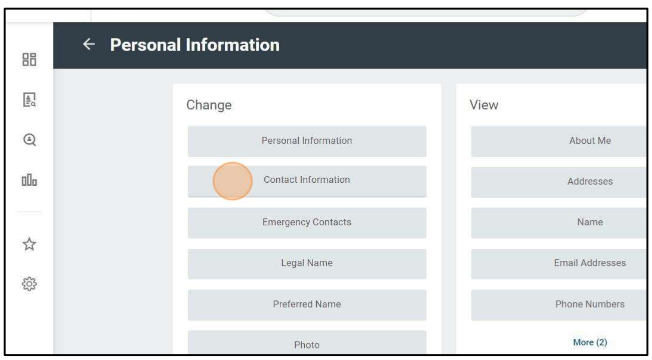
A. Update Contact Information

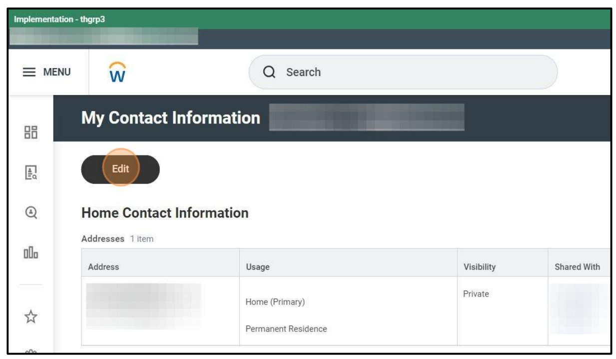
1. Let's cover how to update your personal information. When we go live, it is important that you check your personal information to ensure it's accurate. Click "Menu" at the top lefthand side of the page, then "Personal



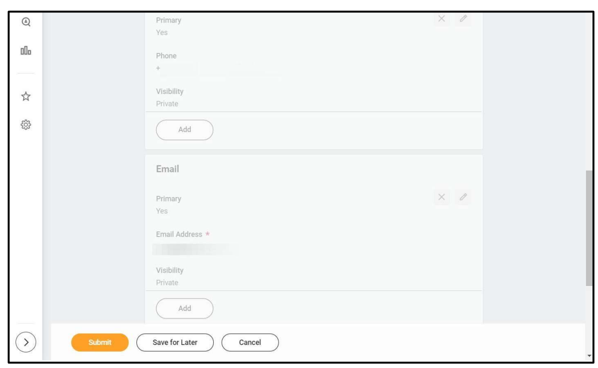


2. Click Contact Information to view what is on file. To make a change, click Edit.



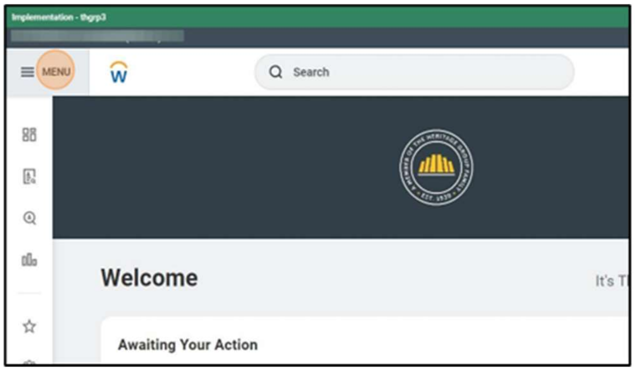


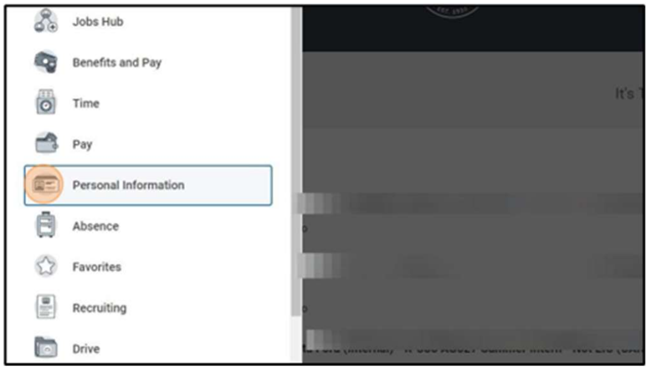
3. To edit a specific piece of information, click the pencil icon, update the information, and then click the orange "Submit" button to save.



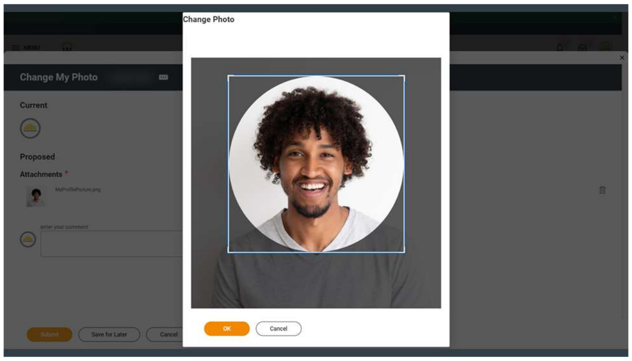
B. Update Profile Picture

1. When we go live, you can update your profile picture! Click Menu, then Personal Information.





2. Adjust Photo.
3. Click **OK.**



IV. Time (Timecards)

A. Your Role in Team and Time Management

Hourly Worker

- **Check in and out** for at the beginning and end of shift, and for meals*
- Speak to their manager / supervisor when there is a **missed/inaccurate check in/out**
- **Submit timecard** for approval at the end of each week**

*If you work at a site with physical time clocks, you will check in and out through badge swipe or biometric reading (TX), not in Workday.
**Even those with physical time clocks will still be required to review and submit timecard in the Workday app.

Manager/Supervisor

Assign hourly worker schedules and make sure they are accurate

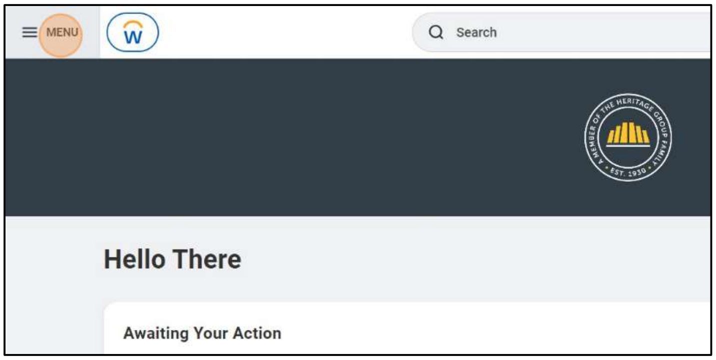
- **Track check in / out times** to ensure accurate time keeping

Handle **missed/inaccurate check in/out** for team members

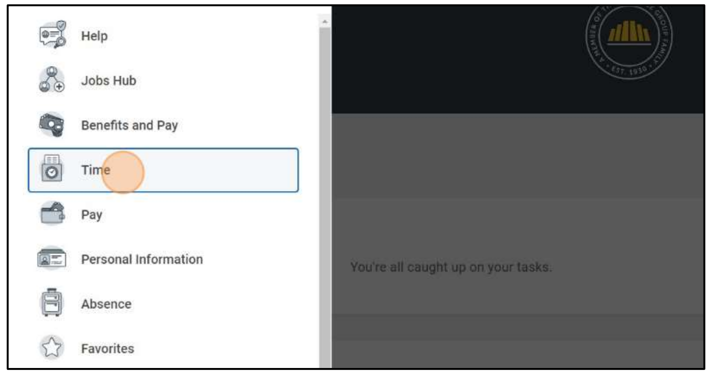
- Check and **approve timecards** each **Monday by 10am EST** (If there is a holiday in a payroll processing week, the deadline is Tuesday by 10am EST)
- **Delegate** to other people when you will be out of the office

B. View Your Schedule

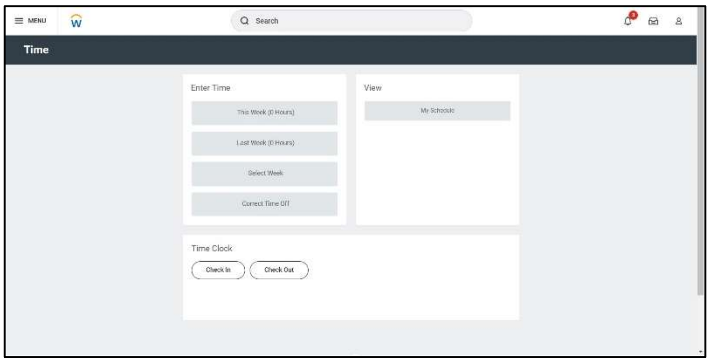
1. Click **Menu**.



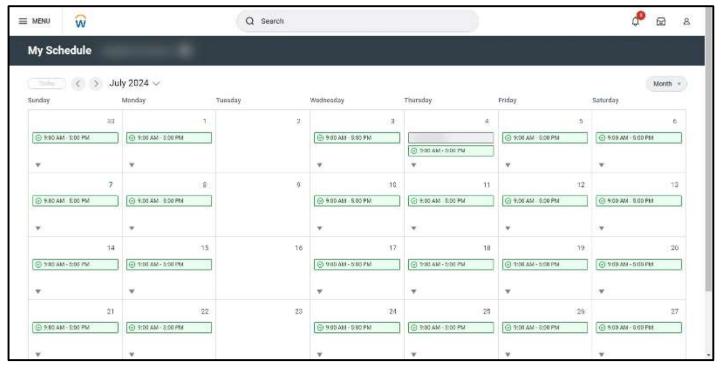
2. Click **Time**.



3. Click **My Schedule**.



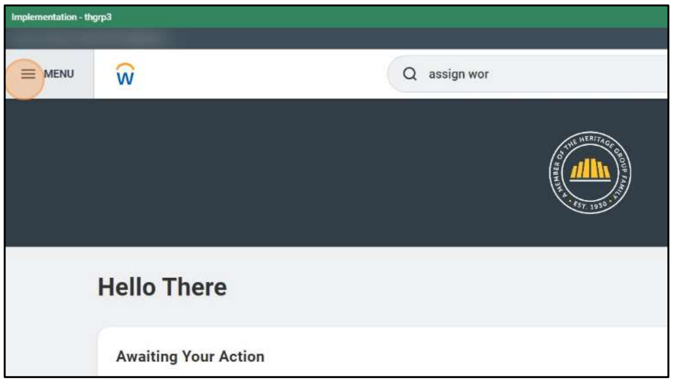
4. You can now view the schedule.

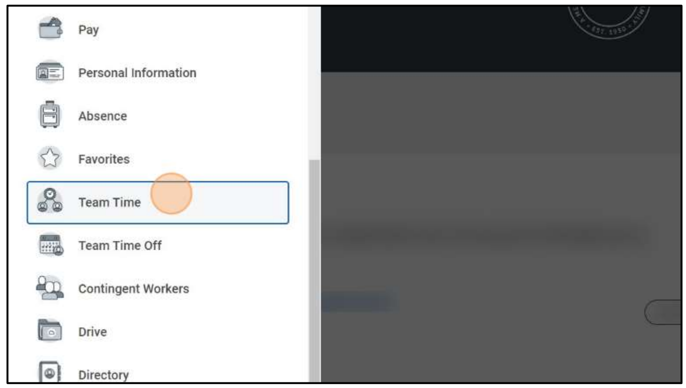


C. Assign Schedules for Managers

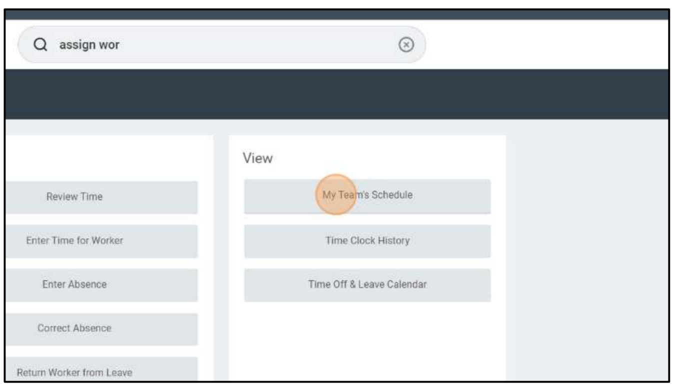
Each team member must have a schedule assigned in Workday. You can assign or change a schedule in Workday, selecting from a pre-populated list of schedules for hourly workers across the businesses. If the schedule you need to assign is not in the system, contact the Employee Hub at 800-303-0408 to add it.

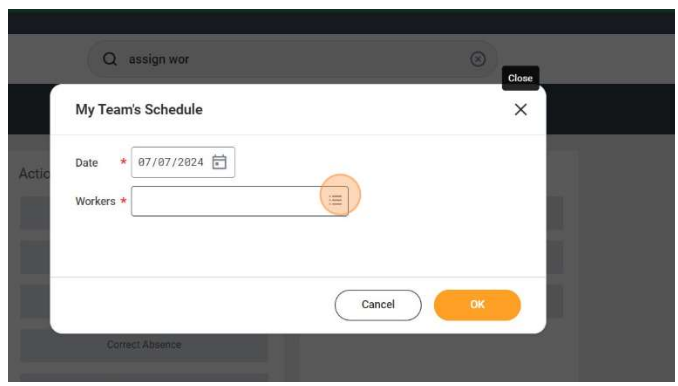
1. Click **Menu** and click **Team Time and Absence.**



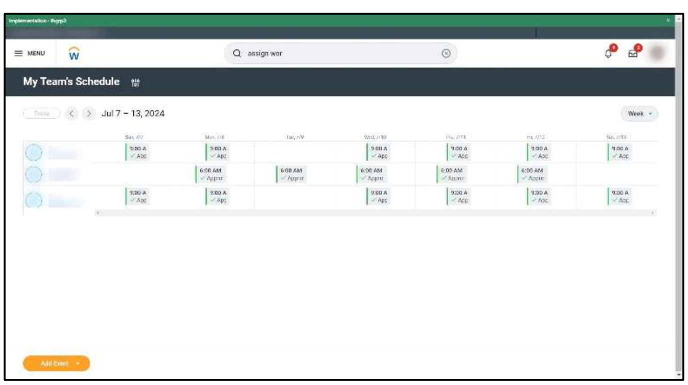


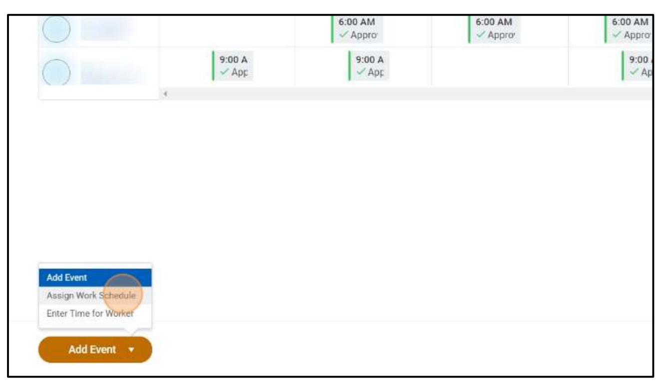
2. Click **My Team's Schedule** and enter the **Effective Date** and my **Worker**. Click **OK**.



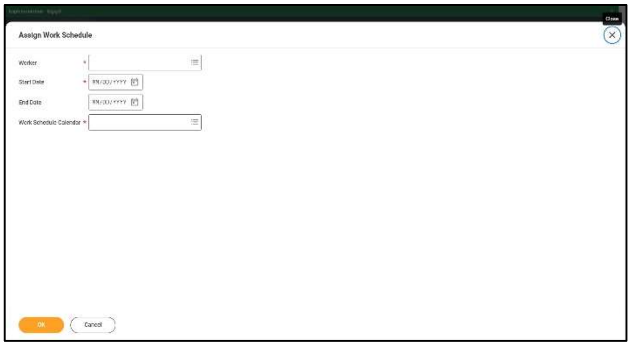


3. Here you can view the schedules of your workers. To make a schedule change, click **Add Event** and **Assign Work Schedule**.





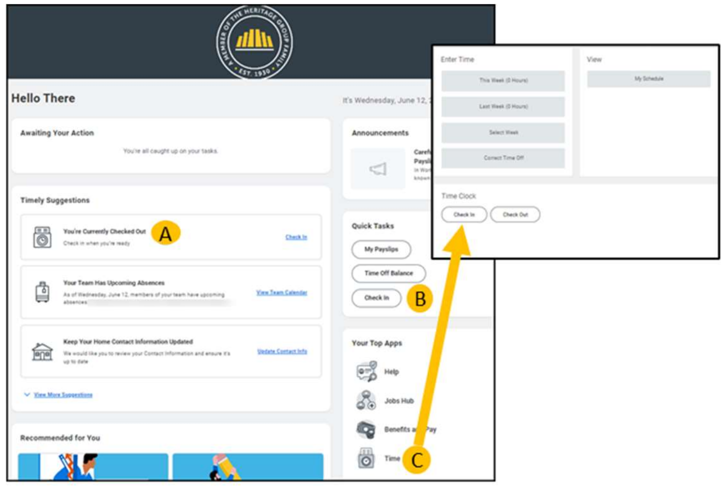
4. Enter the **Worker Name**, the **Start Date** and the schedule. If you need a schedule that is not listed, enter a ticket with Employee Hub at 800-303-0408.



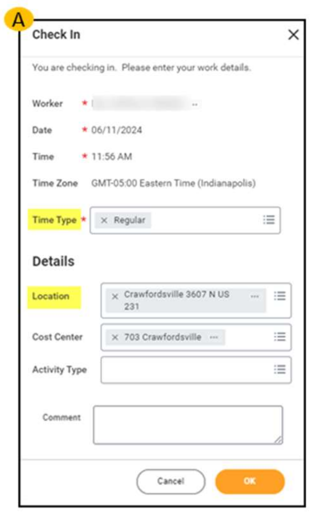
D. Check In and Out

Whether you use a computer/site kiosk, there are multiple ways to check in and check out to record your time. Choose your favorite!

A. In the **Timely Suggestions** section, click the Check In link.
B. In the **Quick Tasks** section, click the Check In button.
C. In the **Your Top Apps section**, choose the Time App and click the Check In button. You can also access the Time App through the Menu.



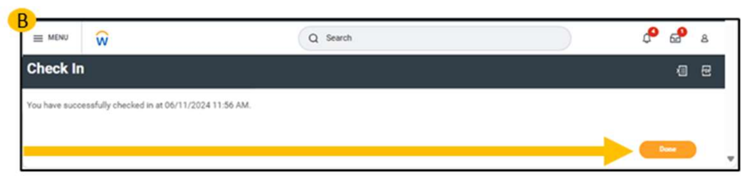
1. Check In



(A) The system defaults to regular hours and your primary work location. If this is correct, click the **OK** button.

Note: For US Aggregates, you will need to enter in the activity type.

(B) You will receive a confirmation message. Click the **Done** button at the bottom right of the page.

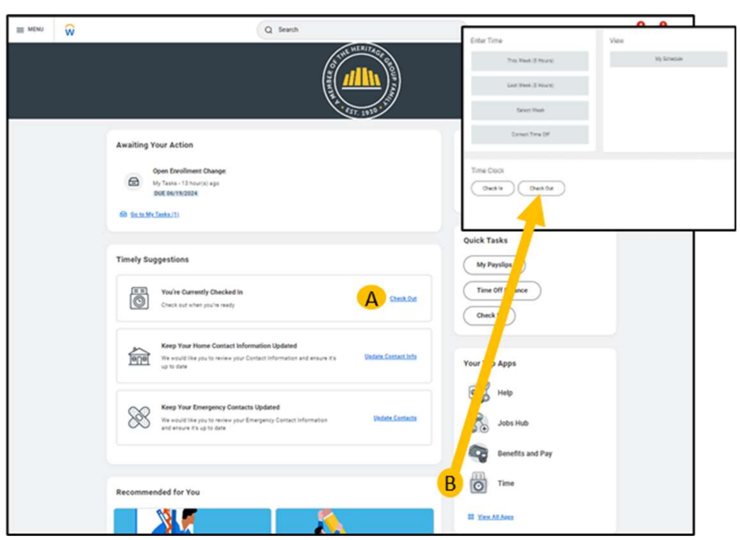


2. Check Out

After you have completed your work, navigate back to

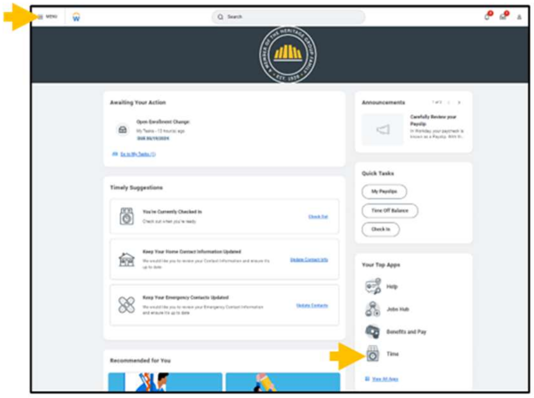
(A) Timely Suggestions, or

(B) Your Top Apps and select **Check Out**.

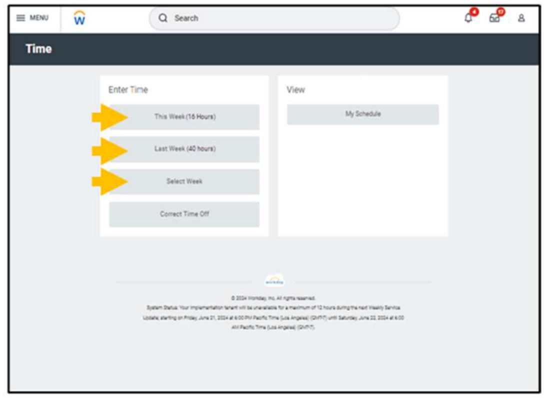


E. Submit Timecard

1. You can view your timecard at anytime using the Time app.



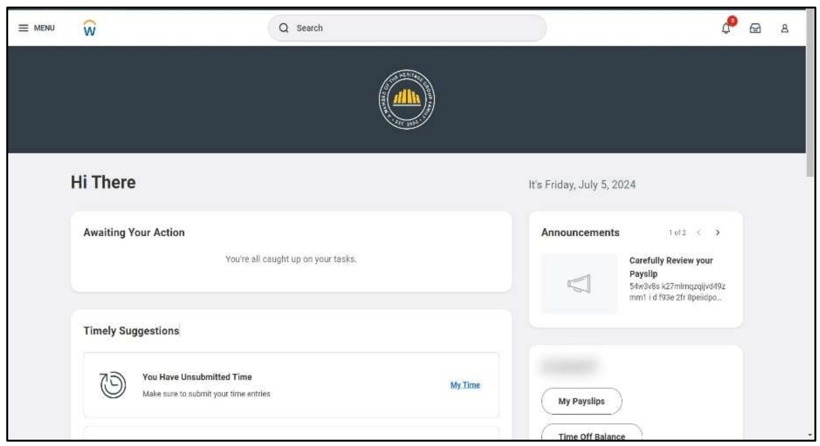
You can review the times you have checked in and out. Go to the **Time App** (you can get there from **Your Top Apps** or the **Menu**).



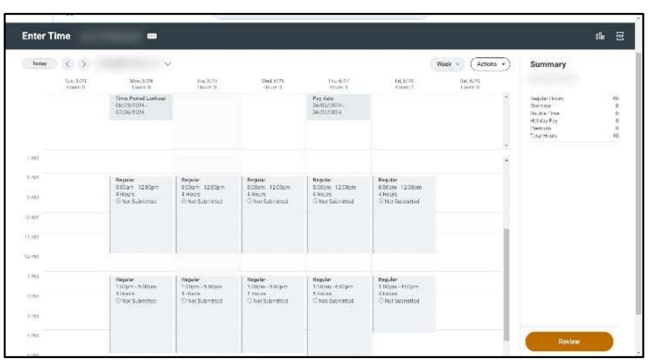
Select what week to see. You can see this week, last week, or any other week in past by choosing select week.

2. You can also see when you have unsubmitted time in Timely Suggestions.

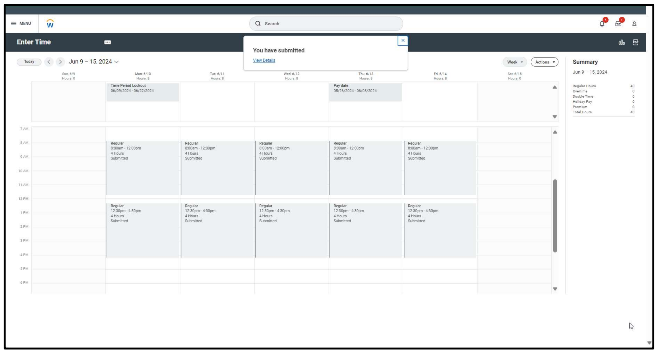
- Time entries must be correct and submitted for approval at the end of your workweek or it could impact payroll. This ensures your paycheck is accurate and prevents delays with payroll processing.
- Review daily time entries and the weekly summary to the right on the page. If it is correct, click the Review button.
- If there are errors, your manger/supervisor will need to correct them.

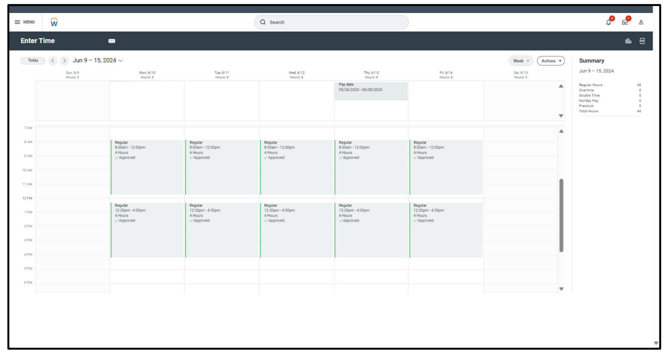


3. Click Review. Review hours and click Submit.



4. The request routes to your manager.

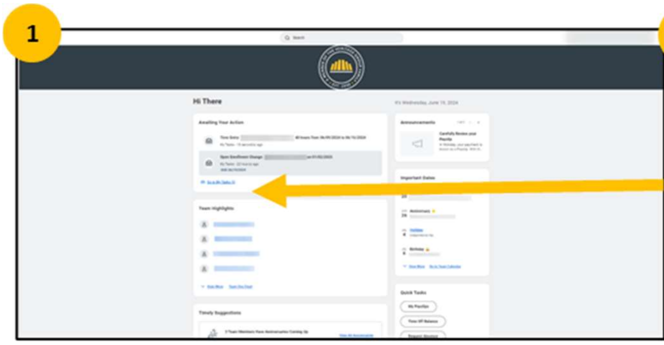




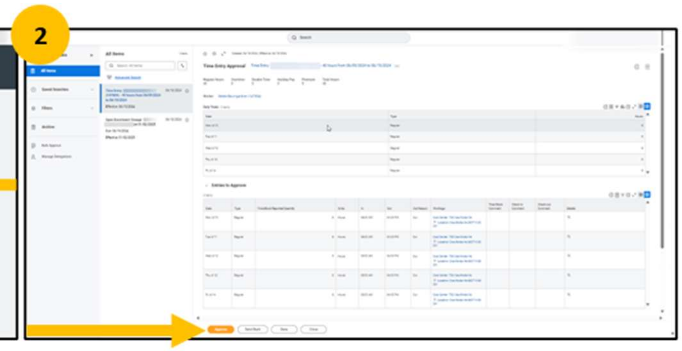
- The time block(s) will route to the manager’s inbox for approval.
- The time block(s) will display “Submitted” until the manager approves.

- Once approved, the time blocks will display “Approved.”

F. Managers Approve Timecards



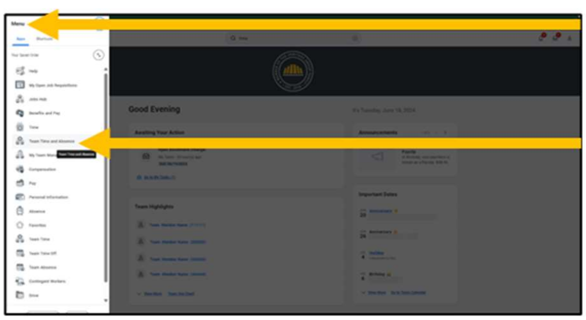
- Go to **My Tasks**. You'll receive an individual notification when a worker submits their timecard.
- Review the time entries for each day and the weekly summary.



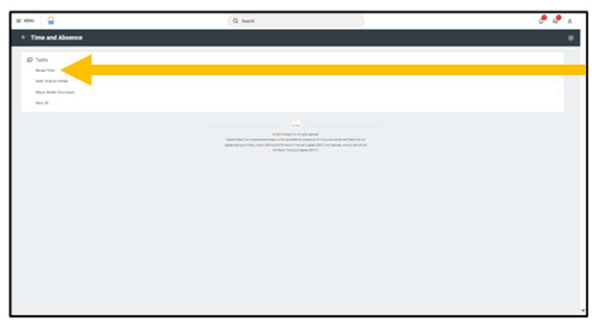
- To approve the submitted time, click the **Approve** button.
- Once you approve a worker's time and see the confirmation message, the information has been sent to payroll for processing.

To Bulk Approve:

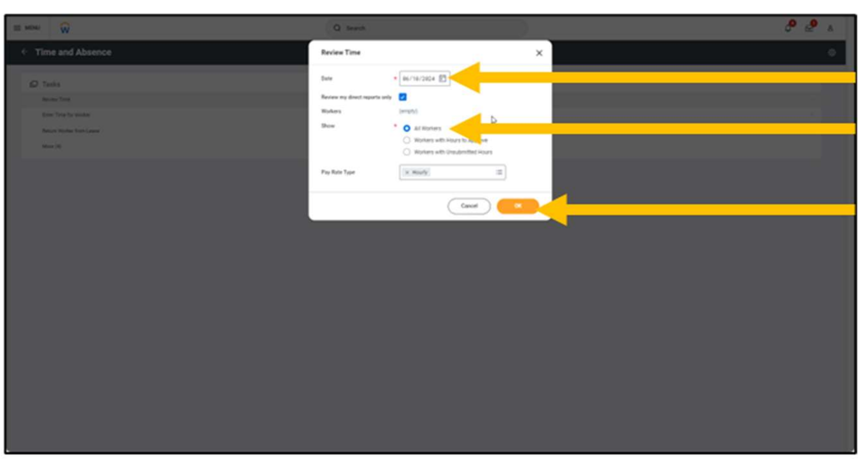
The "**Review Team Time**" Report allows Managers and Supervisors to see the status of team time at a glance.



- Go to **Menu**
- Click **Team Time** and **Absence**

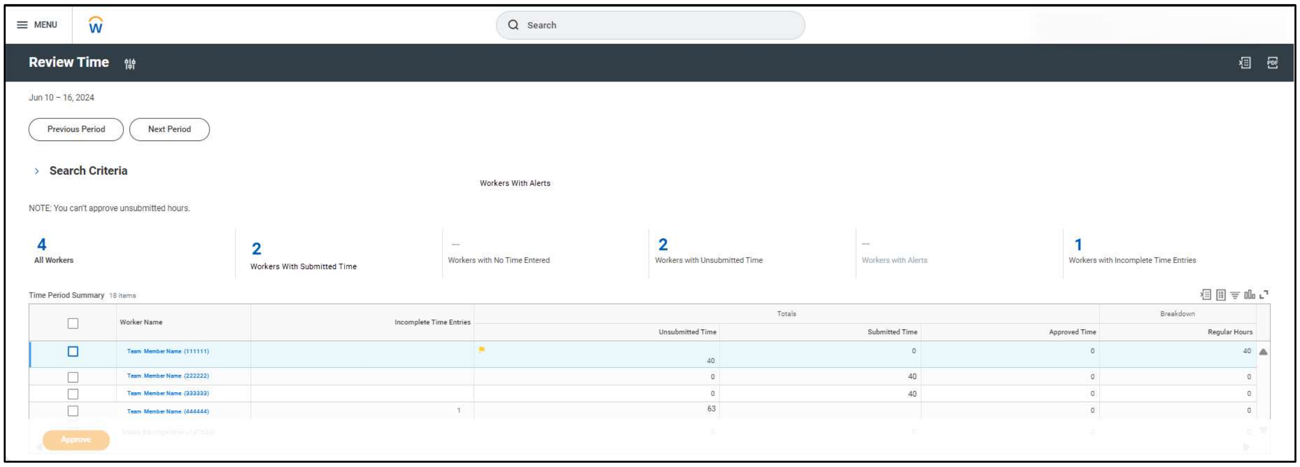


- Click **Review Time**



- Click a **Date** in the pay period you want to review
- Click **All Workers** (or the ones you want to review)
- Click **OK**

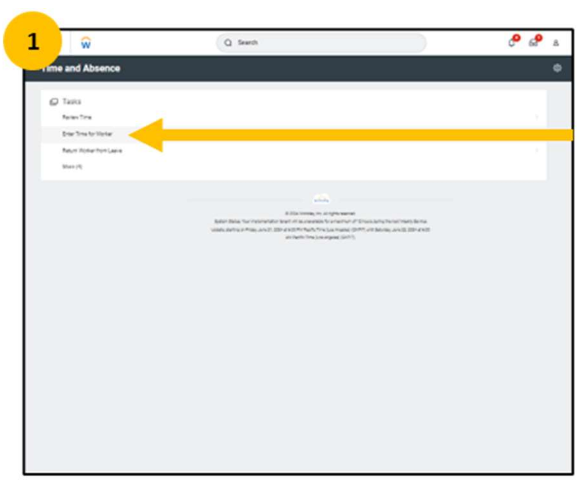
Review who has submitted time with no issues. Click on their name to see their specific hours and carefully check for any discrepancies or errors. If you find any issues, you should address them before approving the timecards. For workers with no issues, you can proceed to approve their time via the “Approve” button. This step confirms that their time entries are accurate and ready for payroll processing. Once you have approved timecards for all members of your team you will receive a confirmation message indicating that the timecards have been successfully approved.

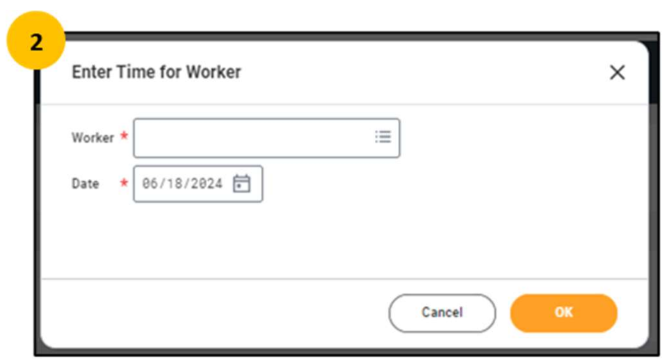


By following these steps, you can efficiently manage and approve your team's timecards, ensuring timely and accurate payment for everyone. Make sure to complete this process by the deadline to ensure timely payment for your team members.

G. Managers Fix Timecard Issues

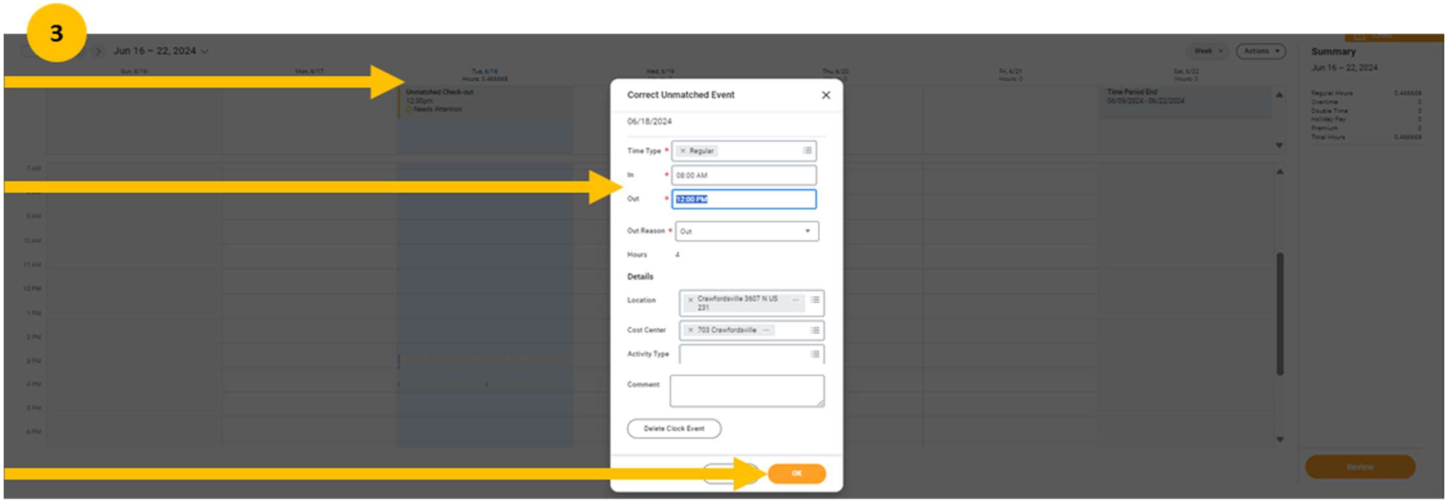
1. Add / Fix Time Punches





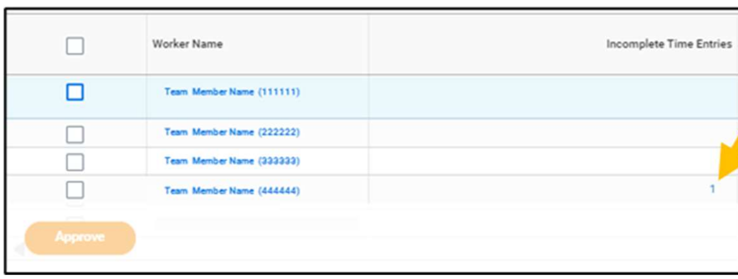
- Go to Menu
- Go to Team Time and Absence
- Click **Enter Time for Worker**

- Enter the Employee Name in the Worker field
- Enter a date in the range of the pay period
- Click **OK**



- Click the Unmatched Event (Unmatched Check In / Check Out). If there is no event and one needs to be added, click in the calendar
- Update the time
- Click **OK**

You can see incomplete time entries on the Review Time Report too!

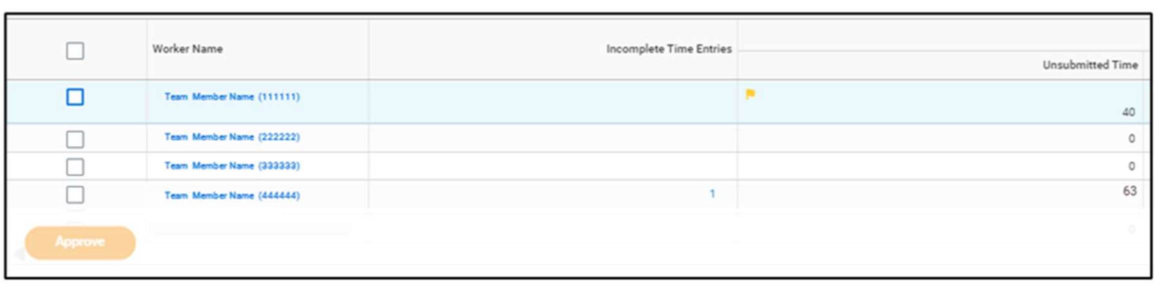


	Worker Name	Incomplete Time Entries
☐	Team Member Name (111111)	
☐	Team Member Name (222222)	
☐	Team Member Name (333333)	
☐	Team Member Name (444444)	1

- Go to Menu
- Go to Team Time and Absence
- Click **Review Time**
- Review Report for any 'Incomplete Entries'
- Click the Employee Name to update it

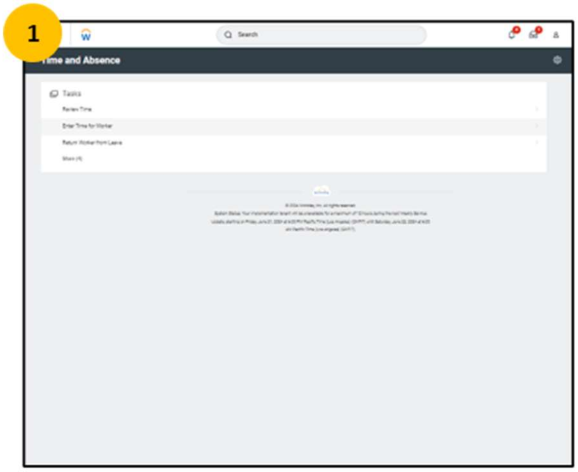
2. Unsubmitted Time

You can only approve a timecard **<u>once it has been submitted</u>**. Time should be submitted by employees but can be submitted by Managers/Supervisors when needed.

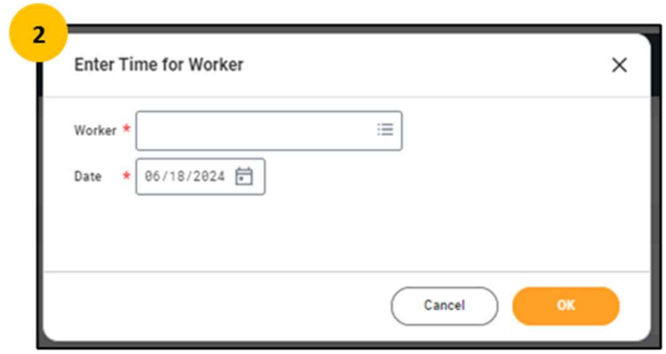


	Worker Name	Incomplete Time Entries	Unsubmitted Time
☐	Team Member Name (111111)		40
☐	Team Member Name (222222)		0
☐	Team Member Name (333333)		0
☐	Team Member Name (444444)	1	63

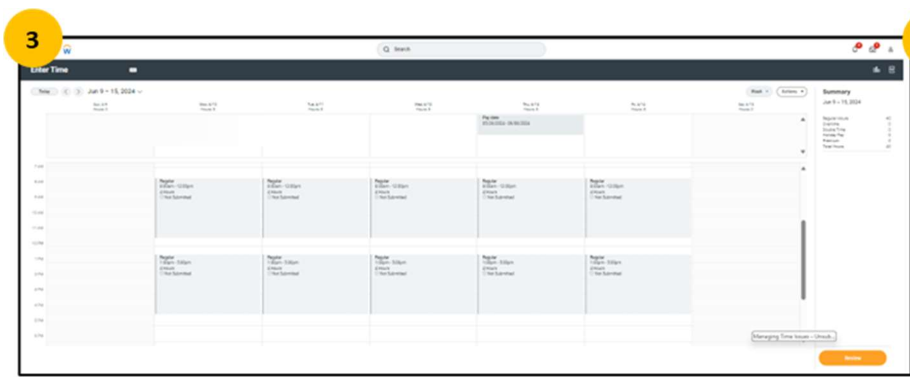
Let's learn how to submit time on behalf of your employee.



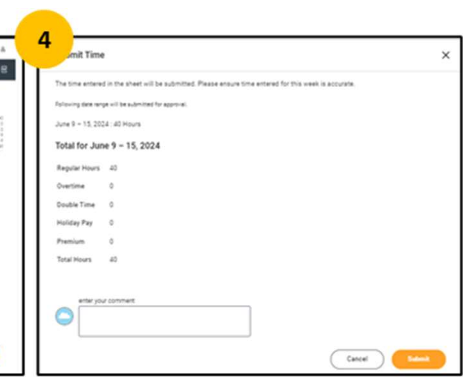
- Go to Menu
- Go to Team Time and Absence
- Click **Enter Time for Worker**



- Enter the Employee Name in the Worker field
- Enter a date in the range of the pay period
- Click **OK**



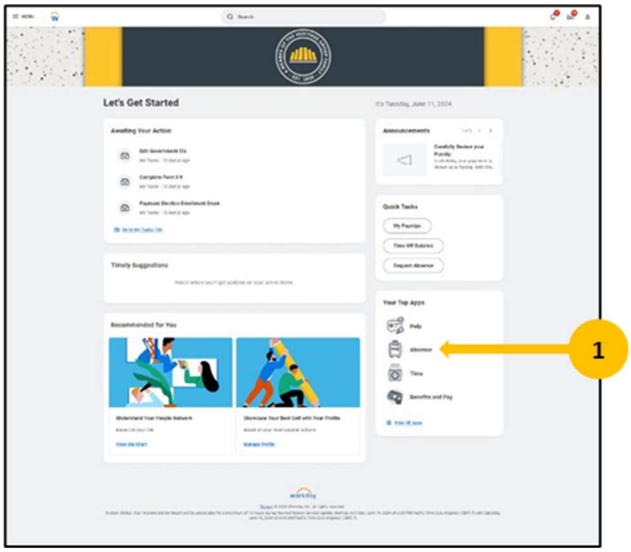
- Review Hours
- Make any needed corrections by selecting the time
- Click **Review**



- Click **Submit**
- The time has been both submitted and approved
- Employee will receive a notification

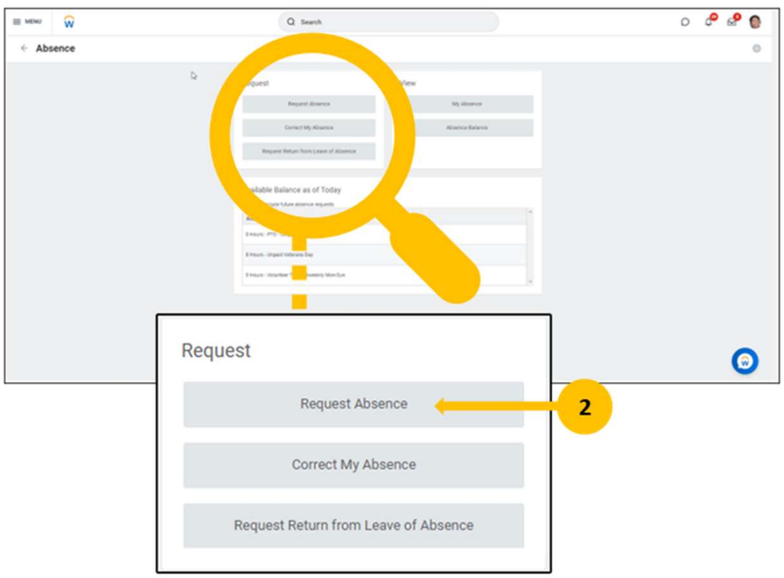
V. Absence (Time Off)

A. View Absence Calendar

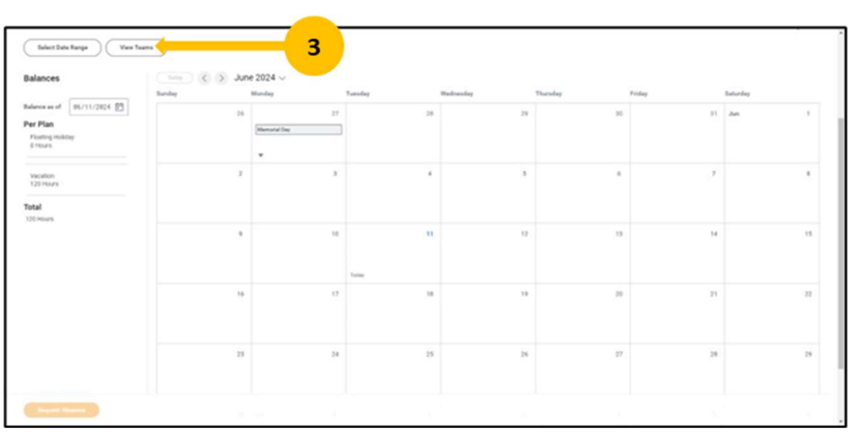


You can see your team (those who report to the same manager (sup org) to identify who else is off.

1. Click **Absence**

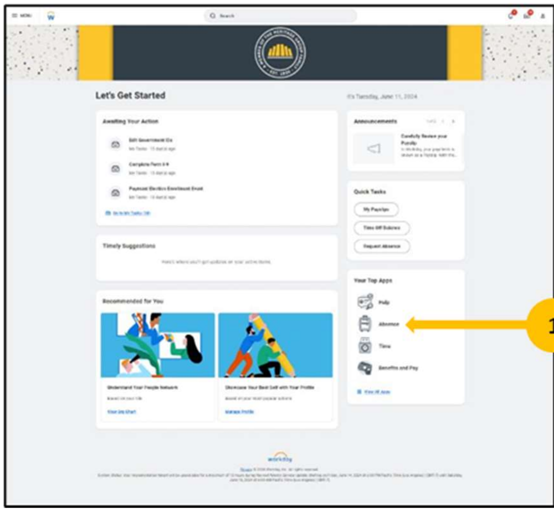


2 Select **Absence Request**.

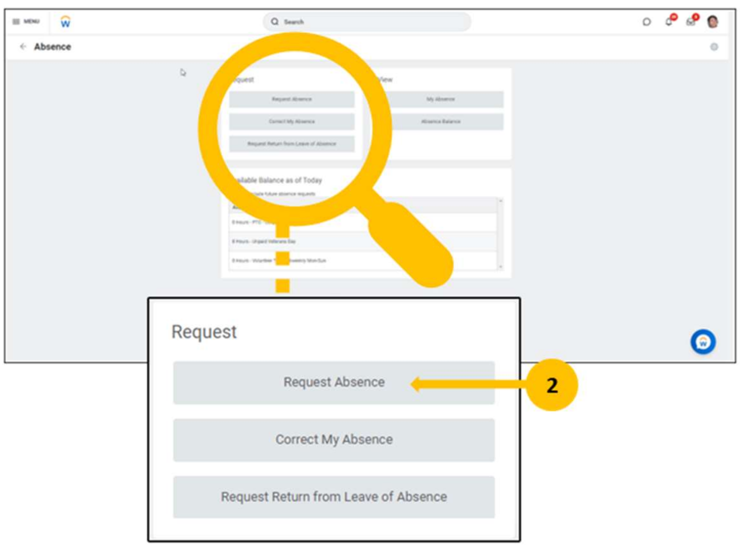


3 Select **View Team**.

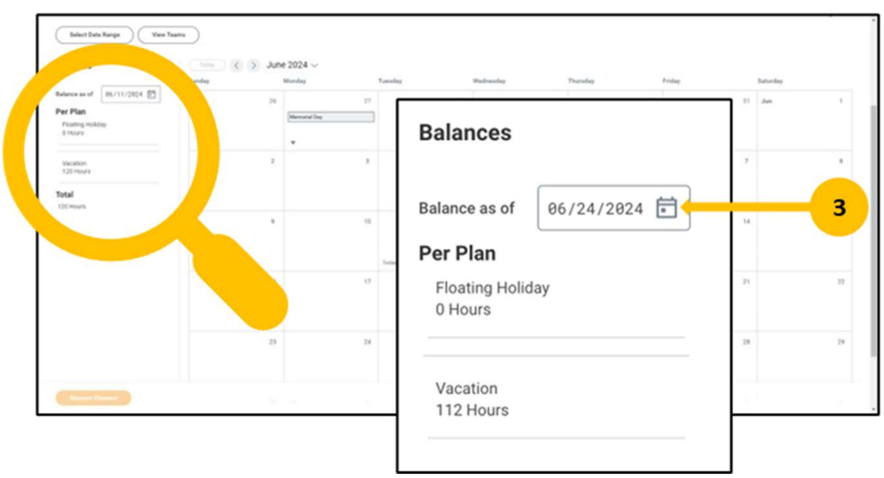
B. Request Absence (Time Off)



1 Select **Absence** (From Your Top Apps or Menu).

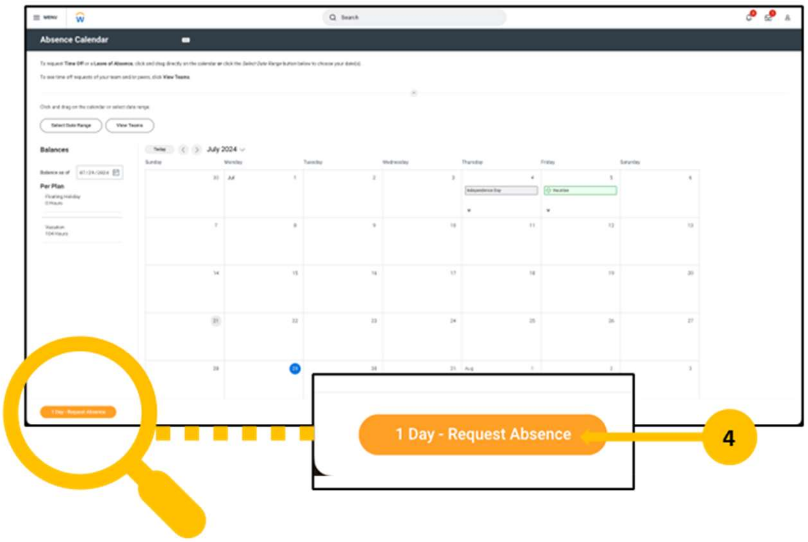


2 Select **Absence Request**.

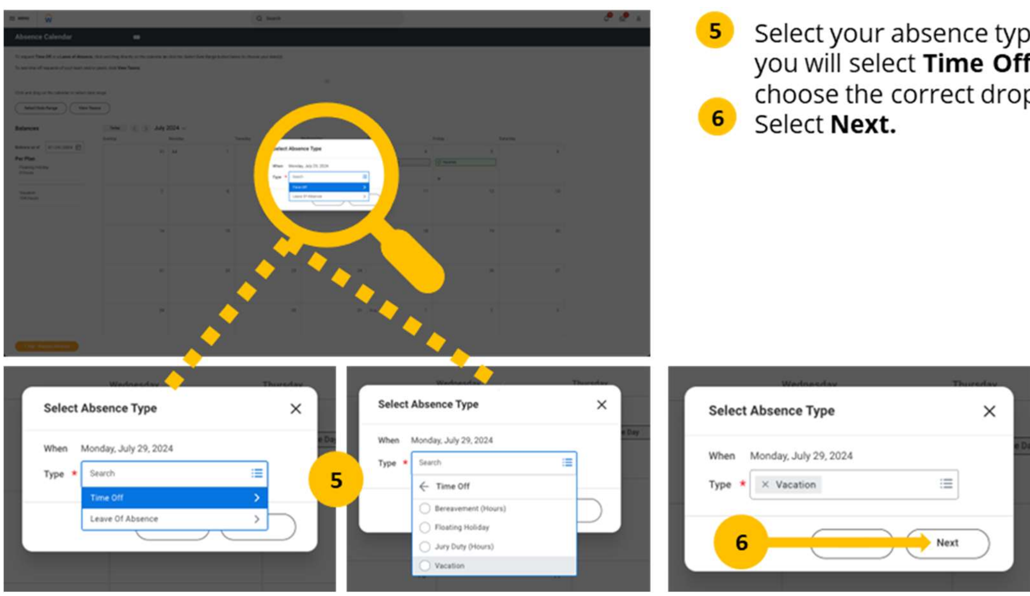


3 Confirm that you have enough time off.

Not sure how much time you will have? Change the "Balance As Of" Date.

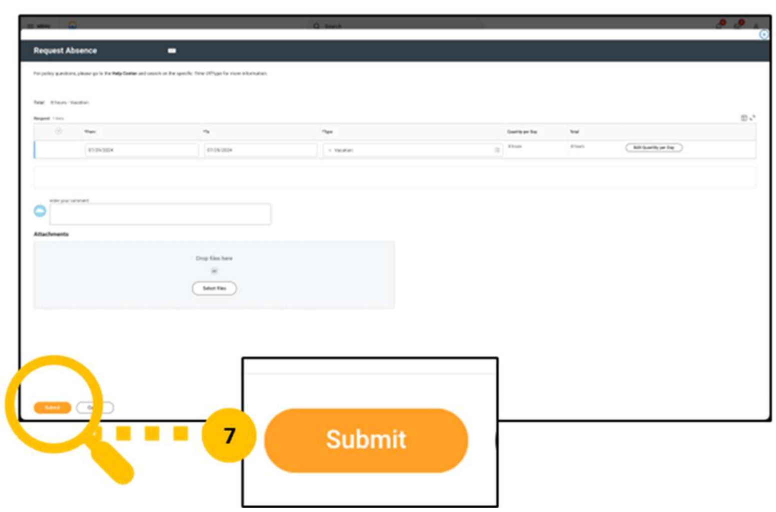


4 Once your time off has been selected, click the **orange button** in the bottom left.



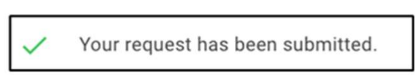
5 Select your absence type. Generally, you will select **Time Off** and then choose the correct drop down.

6 Select **Next.**



7 Confirm your request is correct and click **Submit**.

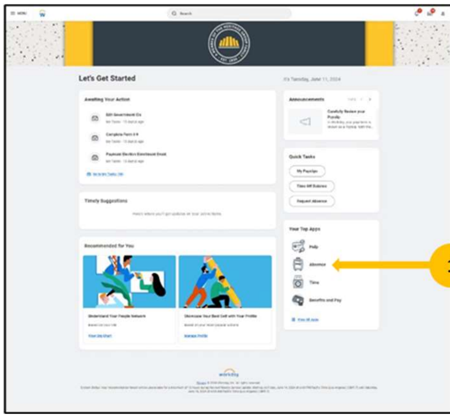
You will get a confirmation that your request has been submitted.



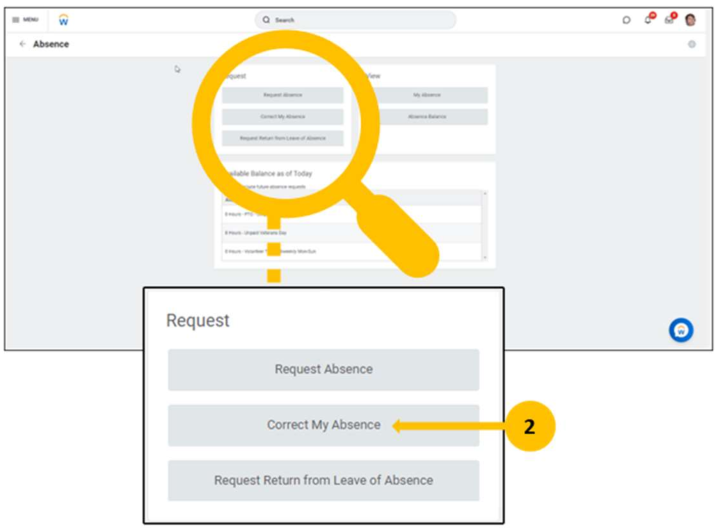
C. Request Leave of Absence (LOA)

Contact Employee Hub at 800-303-0408

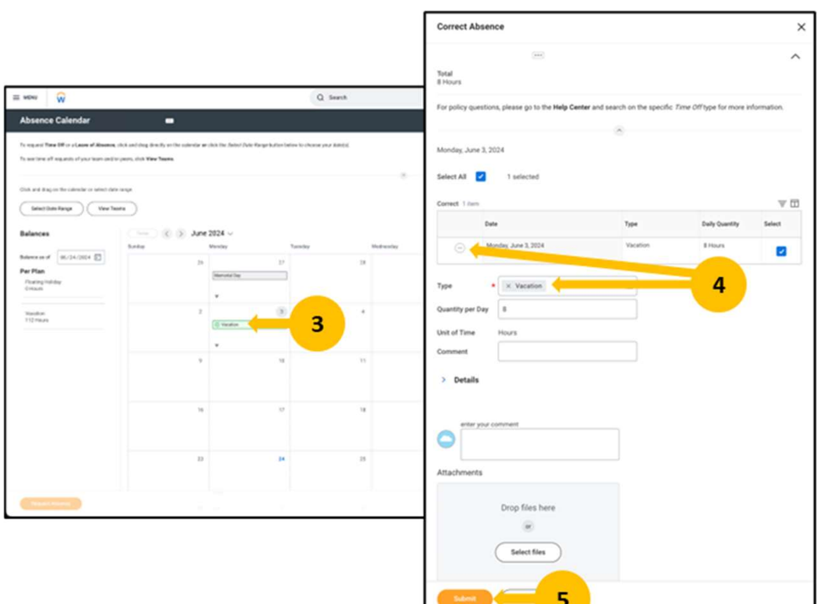
D. Change / Cancel Time Off Request



1 Select **Absence** (From Your Top Apps or Menu).



2 Select **Correct My Absence**.



3 Double click the Time Off you want to change or cancel.

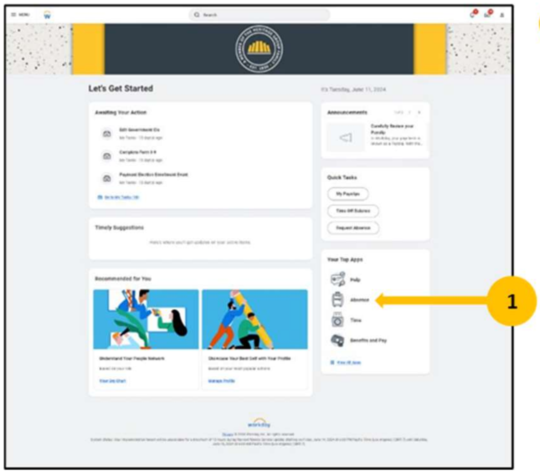
4 Change the hours by updating the **Quantity per Day** or remove the entire day by clicking on the minus sign.

5 Click **Submit**.

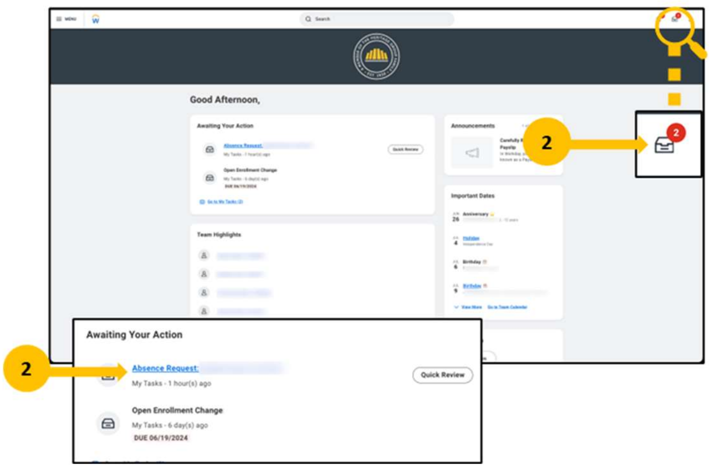
You will get a confirmation that your request has been submitted.

✓ Your request has been submitted.

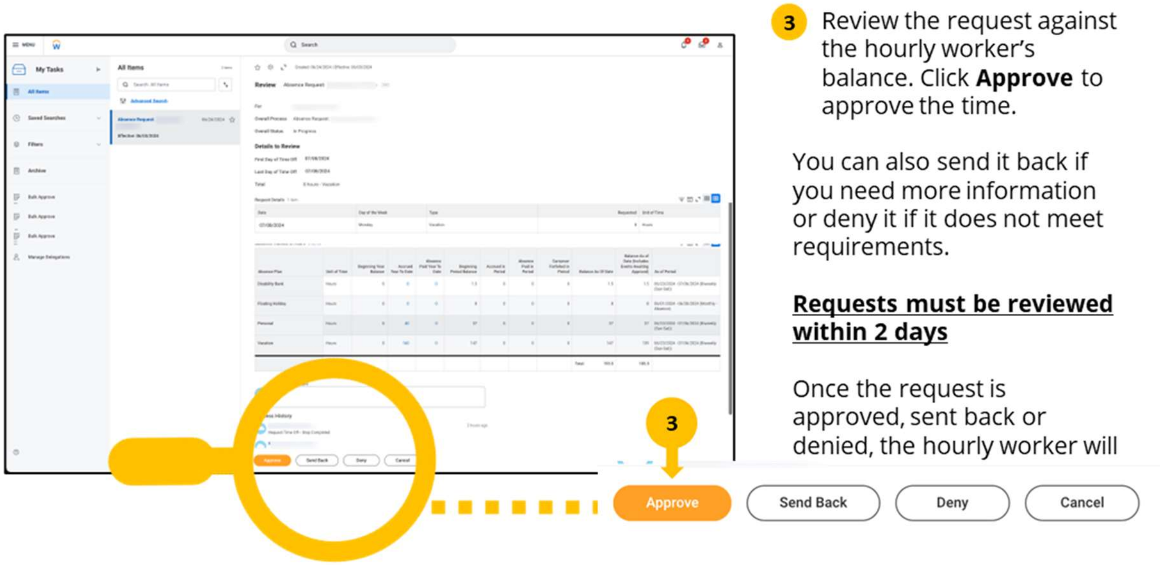
E. Manager Approve Absence



1 Select **Absence** (From Your Top Apps or Menu)



2 Absence Requests appear in **Awaiting Your Action** or **My Tasks**. Click on **Absence Request.**



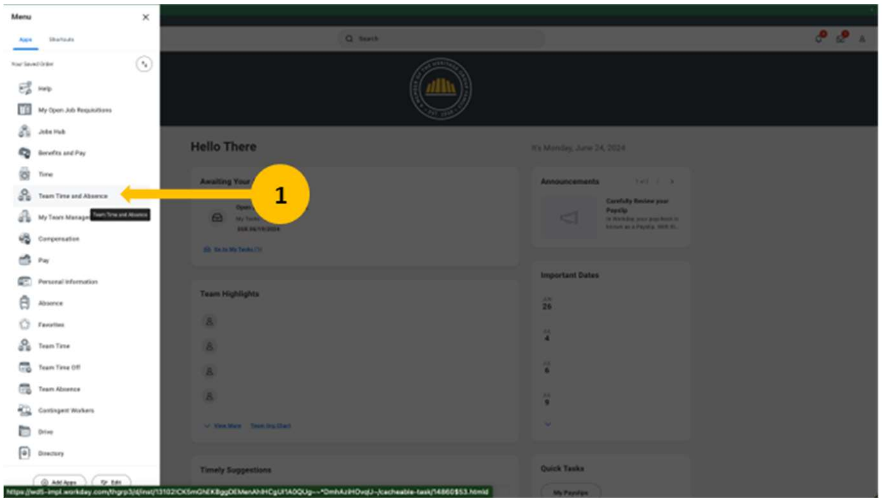
3 Review the request against the hourly worker's balance. Click **Approve** to approve the time.

You can also send it back if you need more information or deny it if it does not meet requirements.

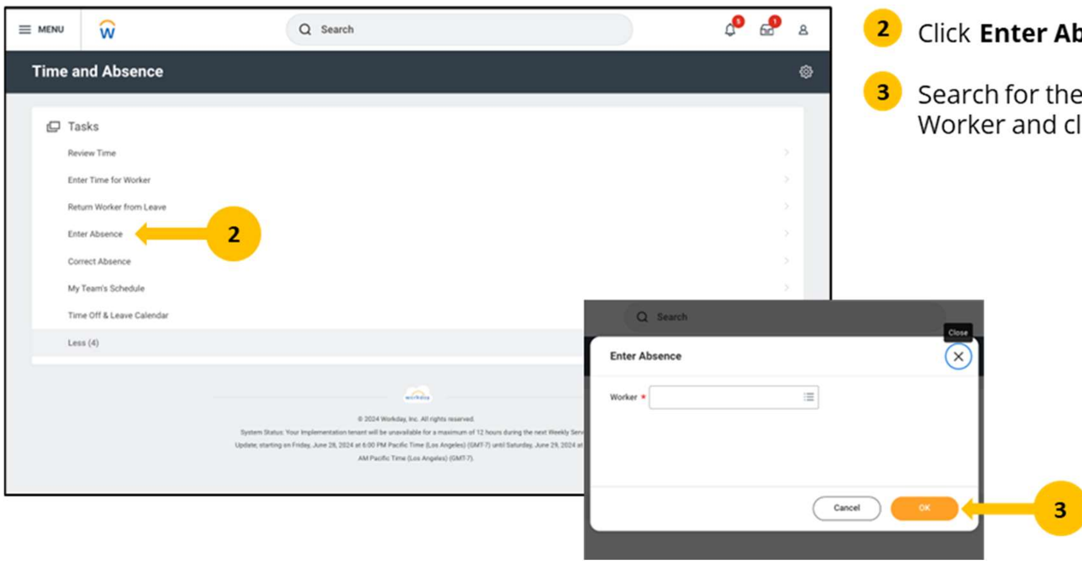
Requests must be reviewed within 2 days

Once the request is approved, sent back or denied, the hourly worker will

F. Manager Enter Absence on Behalf of Hourly Worker

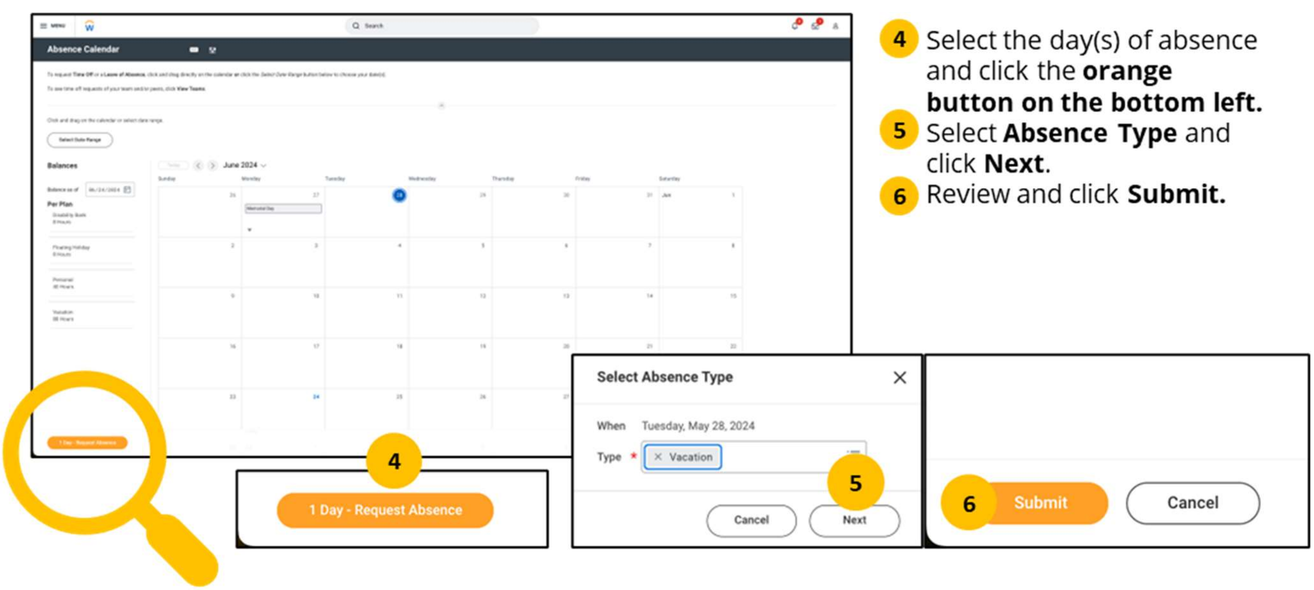


1 Select **Team Time and Absence**



2 Click **Enter Absence**

3 Search for the Hourly Worker and click **OK**

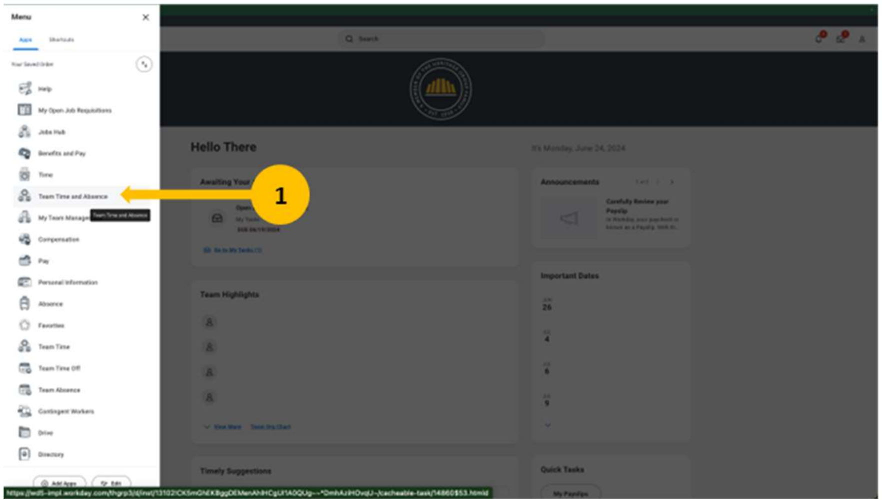


4 Select the day(s) of absence and click the **orange button on the bottom left.**

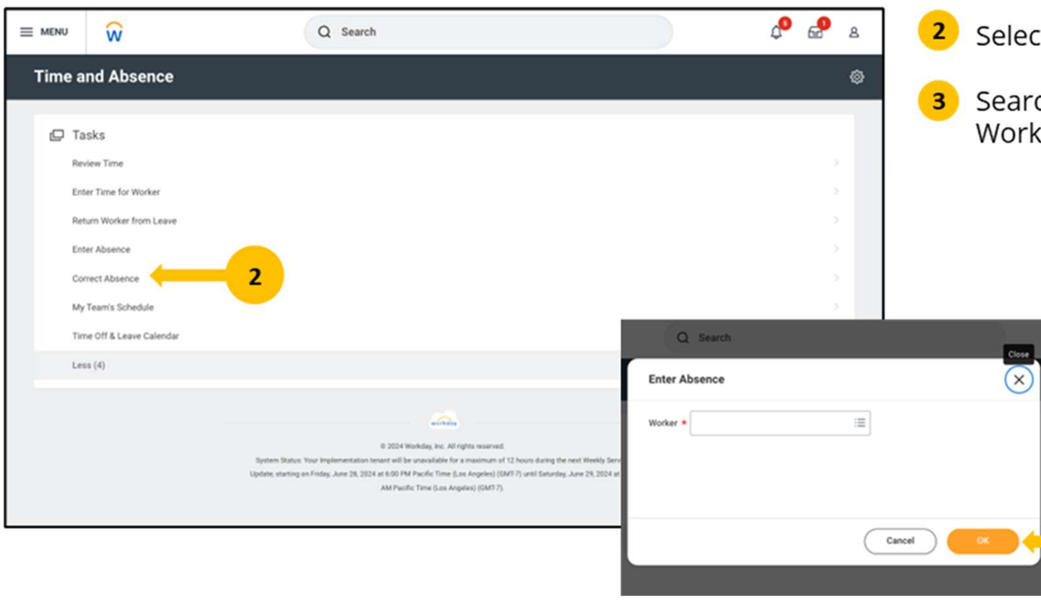
5 Select **Absence Type** and click **Next**.

6 Review and click **Submit.**

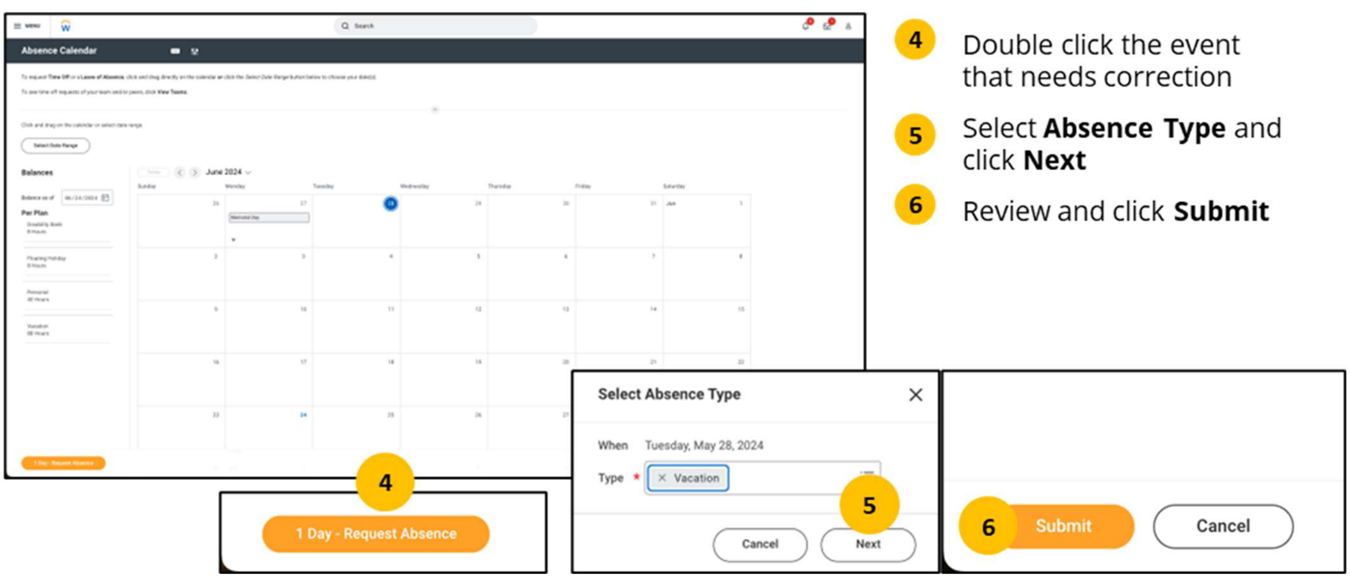
G. Manager Correct Absence for Hourly Worker



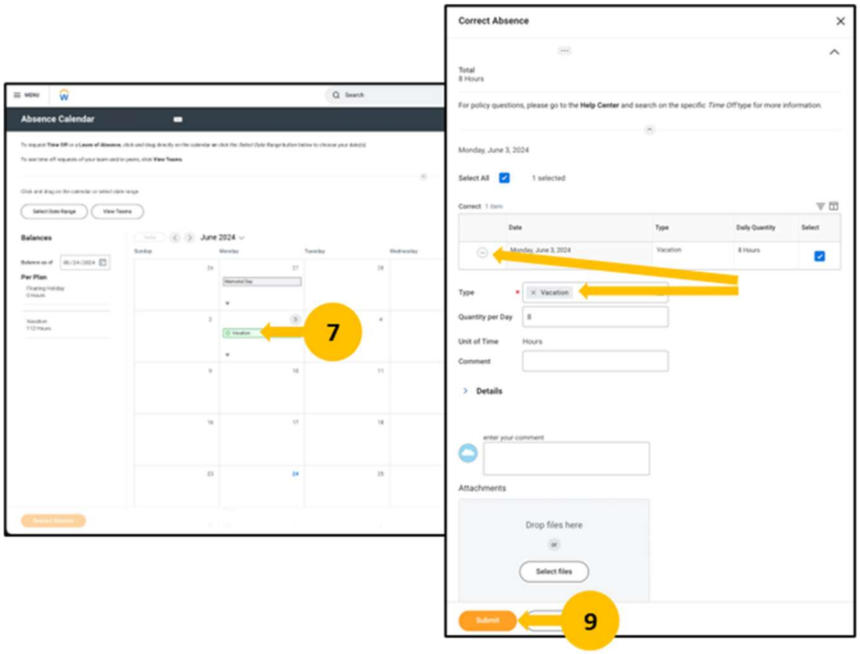
1. Select **Team Time and Absence**



2. Select **Correct Absence**
3. Search for the Hourly Worker and click **OK**



4. Double click the event that needs correction
5. Select **Absence Type** and click **Next**
6. Review and click **Submit**



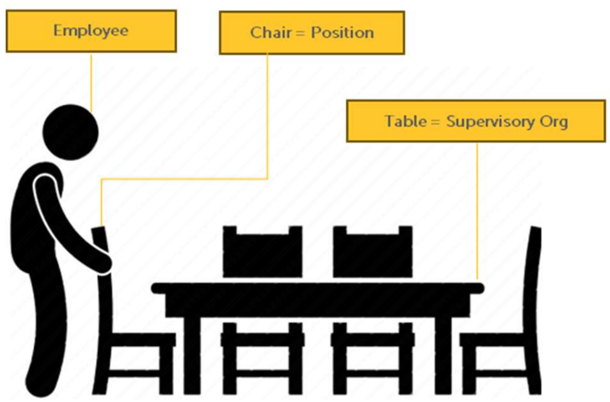
7. Double click the Time Off you want to change or cancel
8. Change the hours by updating the **Quantity per Day** or remove the entire day by clicking on the minus sign
9. Click **Submit**

VI. Team Management and Delegation

A. Position Management

Staffing Model is a structure that defines how *positions* and *jobs* are created and filled in a supervisory organization. At THG, *jobs are used by Craftworkers*, and *positions are used by the rest of the organization*. These two staffing models allow THG to meet varying business needs rather than applying one staffing model that will not meet the needs of all teams or divisions.

Position Management *(table w/chairs)*	**Job Management *(table with no chairs)***
Before you can hire, promote, or transfer workers, an open and approved position is required.	You do not need to create a separate, open position for each job you want to fill.
You need to specify the number of positions to fill, and each worker is then hired into a specific position.	Hiring is not limited to a pre-defined number of openings.
Tracking and reporting on open positions (or seats).	Track and report on filled jobs only.



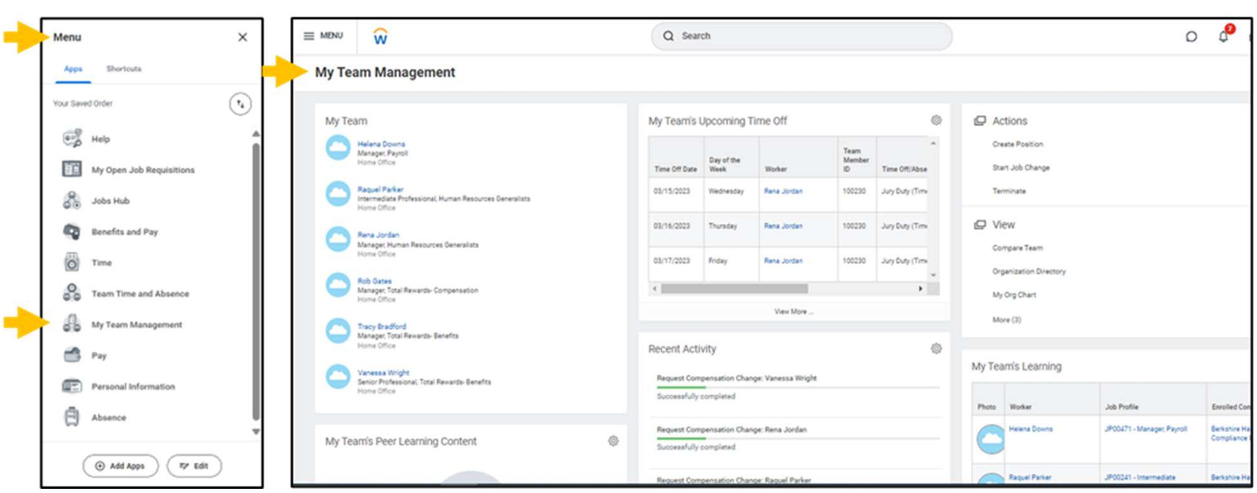
For THG companies using position management, for **every headcount we use the metaphor of a 'chair'.**

Every employee must have an approved 'chair' to sit in, which equates to a position.

In Workday, we will have a position created for every employee in our position managed organizations.

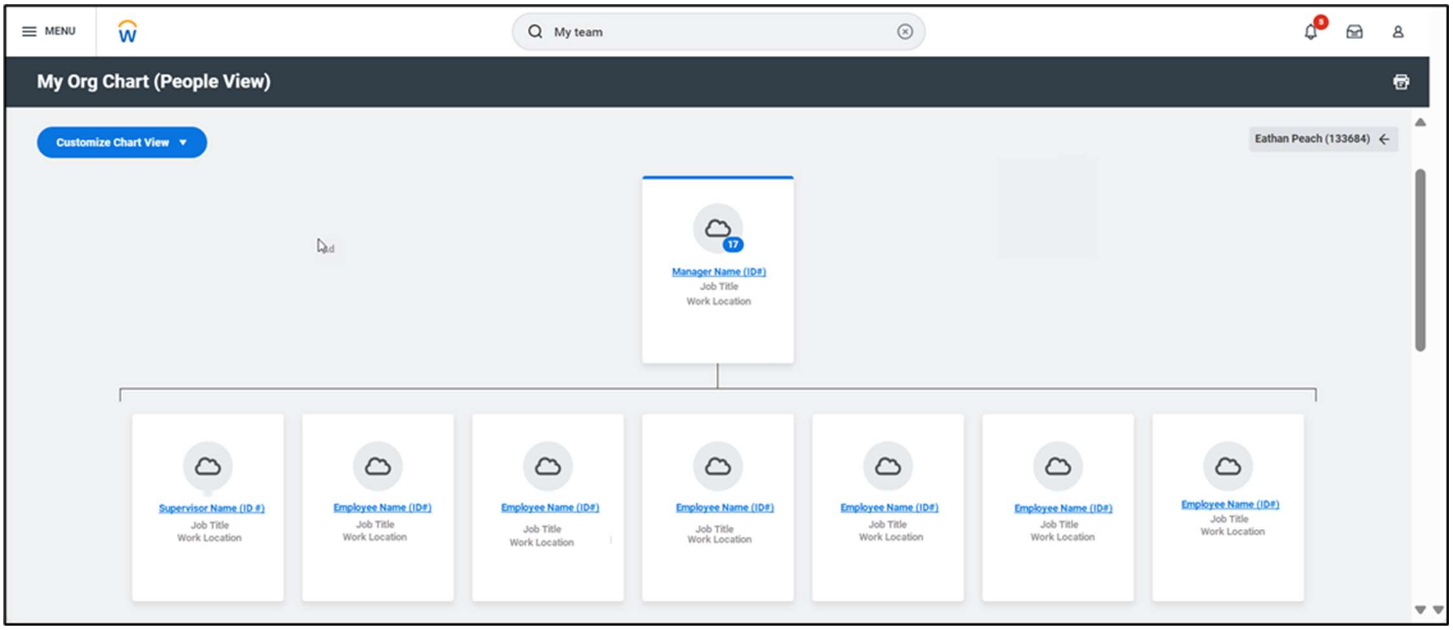
B. My Team Management

Next, let's see how you can view your team in Workday. Click on the Menu icon, then select "My Team Management." Here, you can see important information like who is on leave, and your org chart.



C. My Org Chart

The org chart shows the hierarchy of your team. Here and on the Team Management, you can select an employee's name to get to their profile.

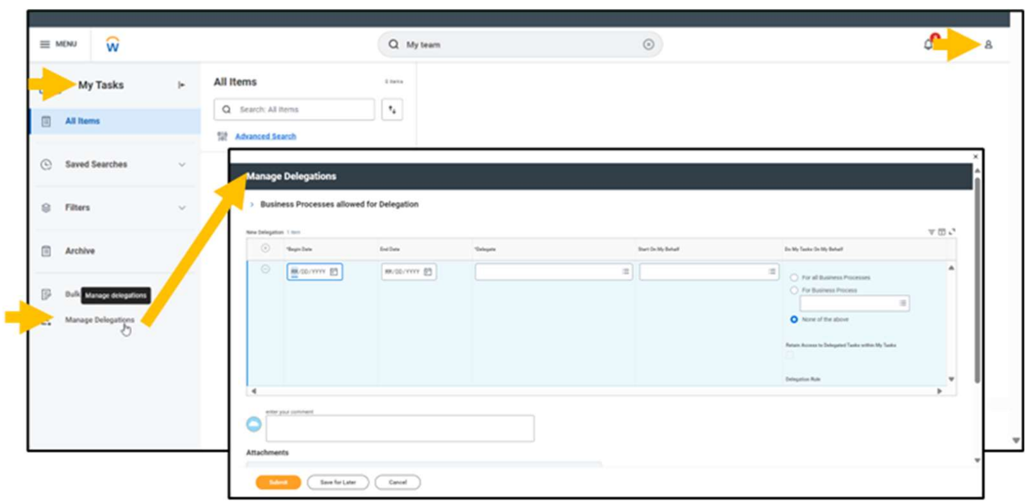


D. Delegation

Temporarily assign tasks to someone else. Useful when you are on vacation, LOA, etc. and another manager is supporting your team. It may also be used by Executive Assistants or other support staff.

To Delegate

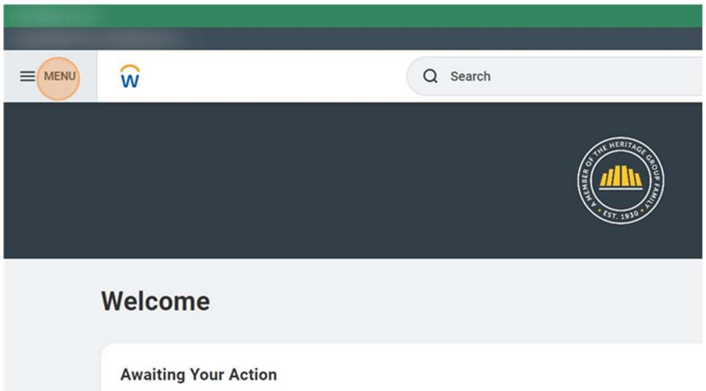
- Profile > My Tasks > **Manage Delegations**



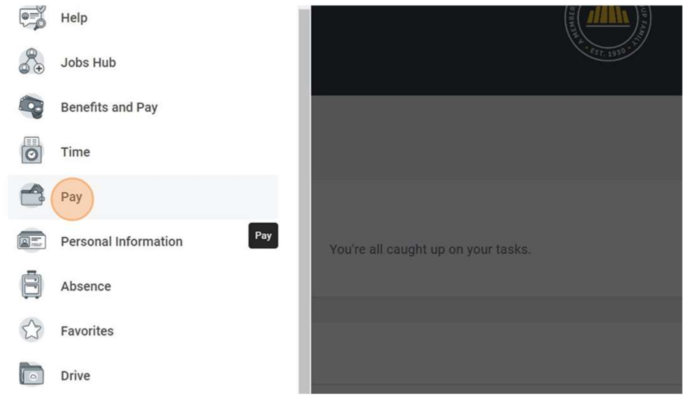
VI. Compensation (Pay and Tax Information)

A. Payslips

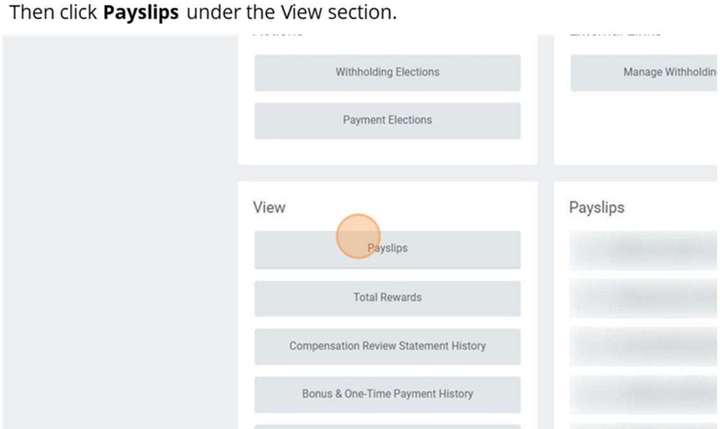
Get payslips by clicking on **Pay** in the Menu app



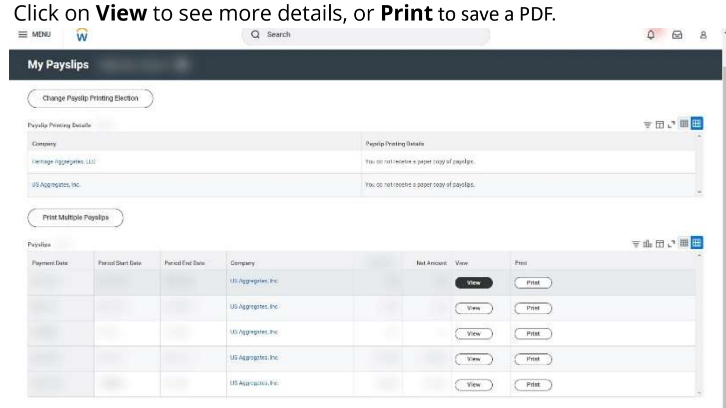
Get pay slips by clicking on **Pay** in the Menu app.



Then click **Payslips** under the View section.

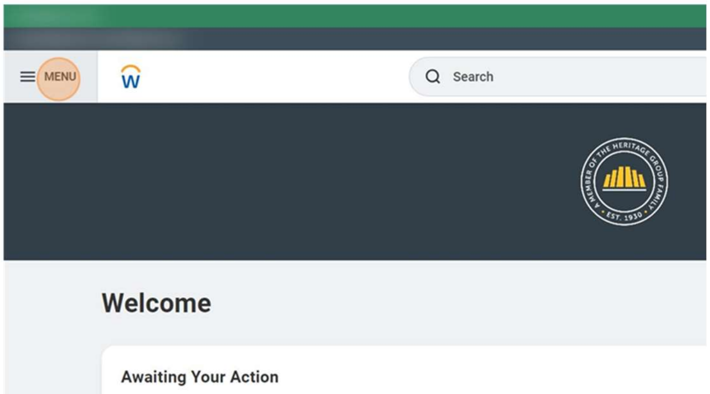


Click on **View** to see more details, or **Print** to save a PDF.

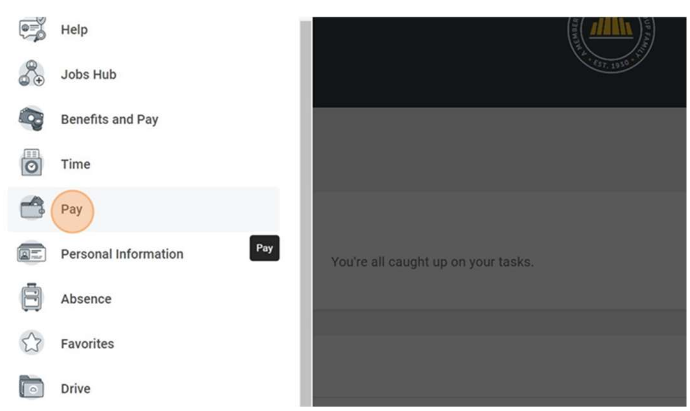


B. W-2 Tax Documents

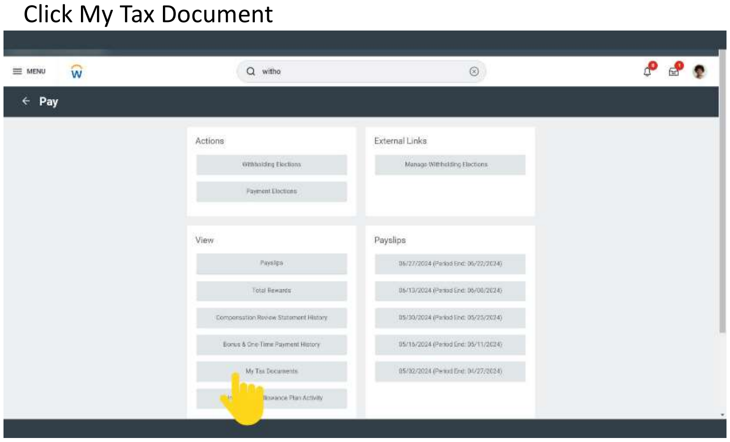
Get to W2 Forms by clicking on **Pay** in the Menu App.



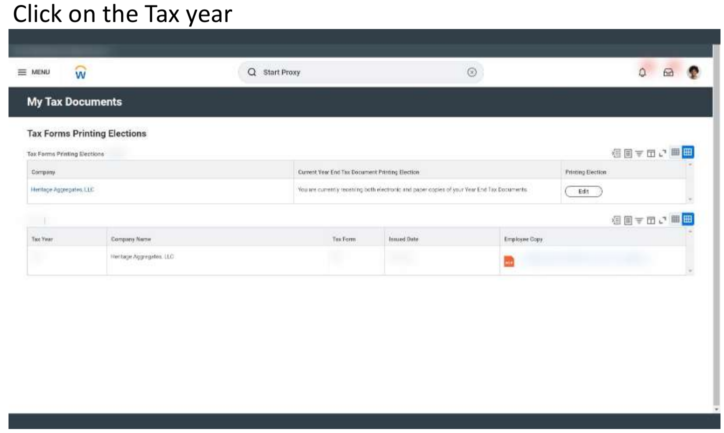
Click **Pay**.



Click My Tax Document



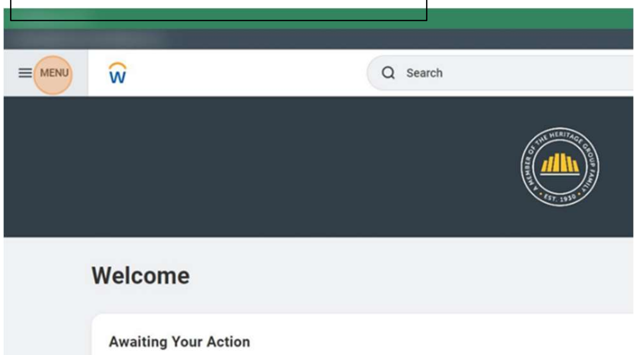
Click on the Tax year



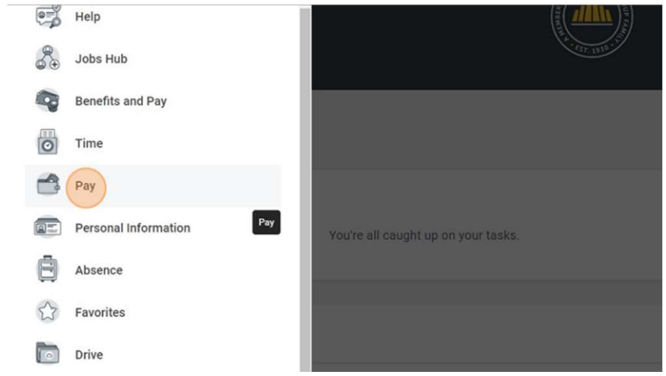
C. Total Rewards

This shows you a summary of all the pay and benefits you get from your job. It includes your salary, bonuses, and any other benefits. It's a great way to see the full value of what you earn.

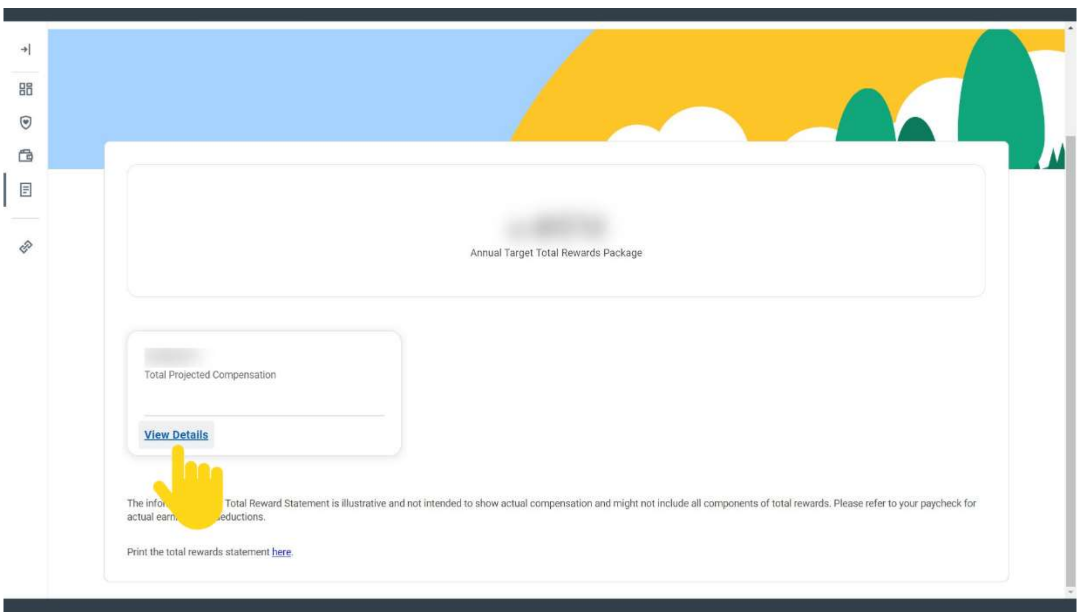
Click Menu

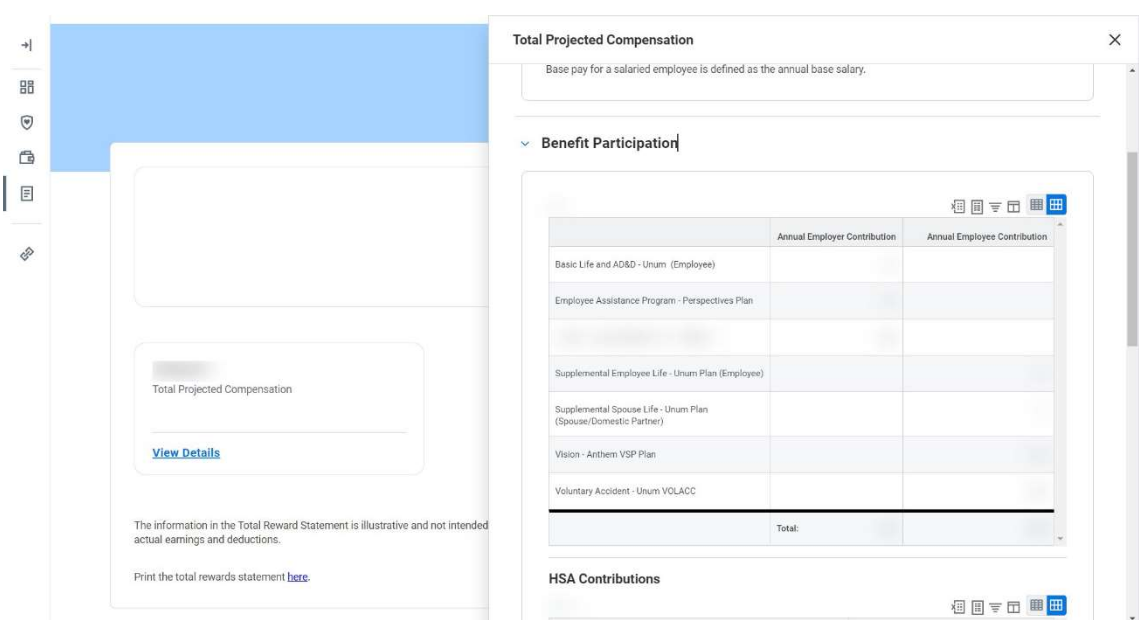


Get to Total Rewards by clicking on **Pay**.



Click on View Details.

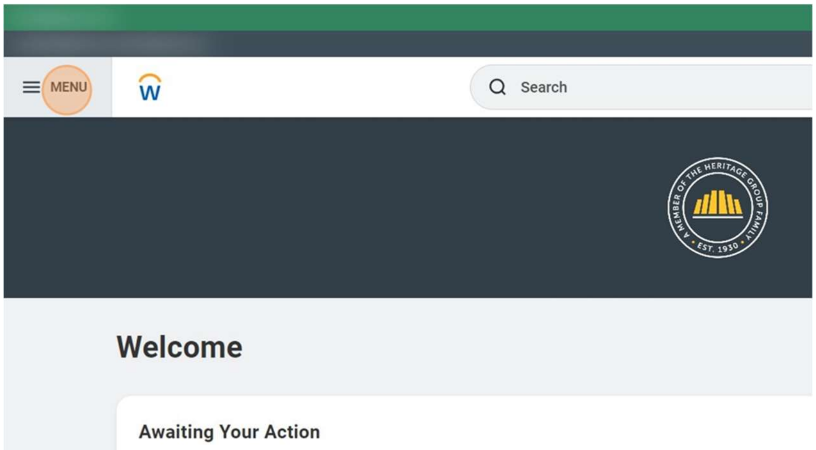




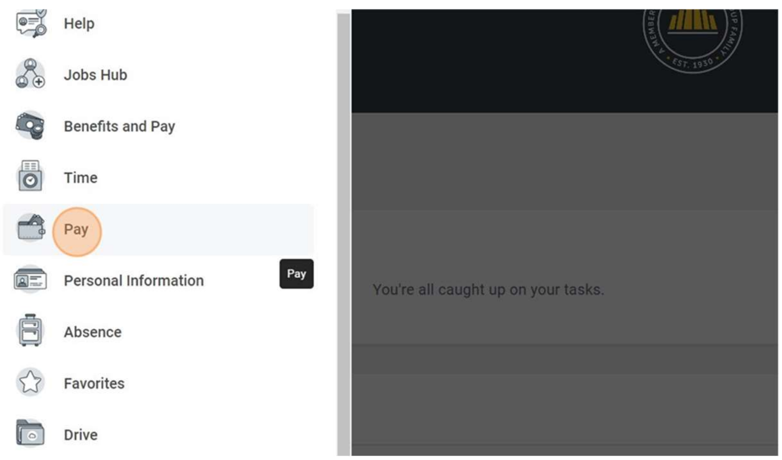
D. Payment Elections (Direct Deposit)

Direct Deposit is called "Payment Elections" in Workday

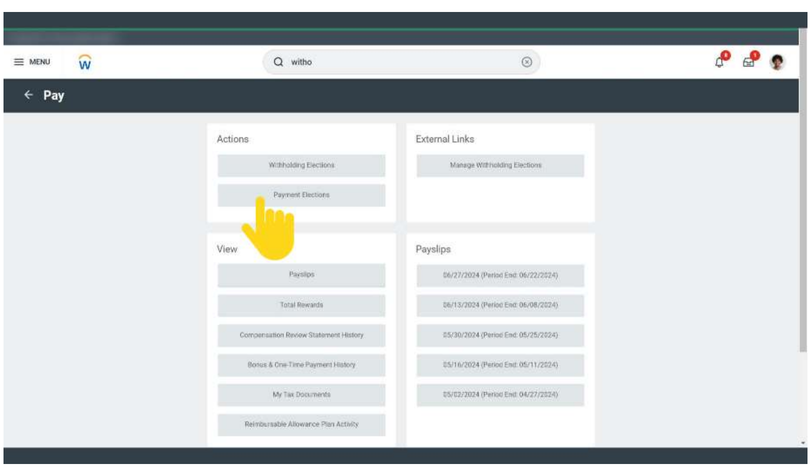
You can access your direct deposit information by first going to the “Menu” button.



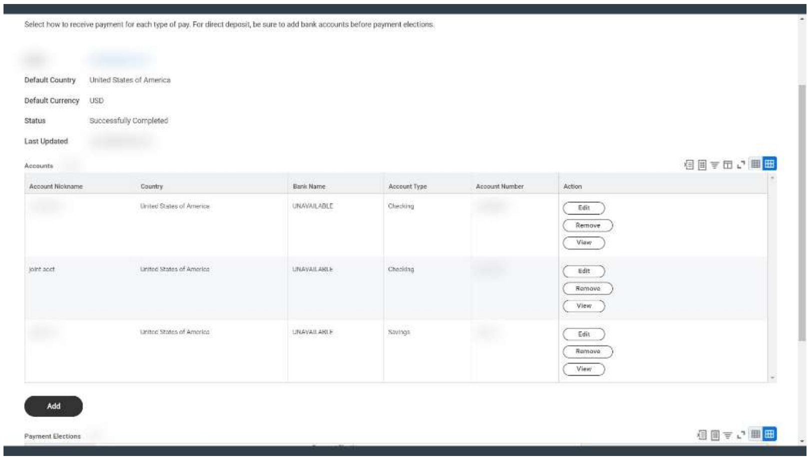
Then click “Pay”.



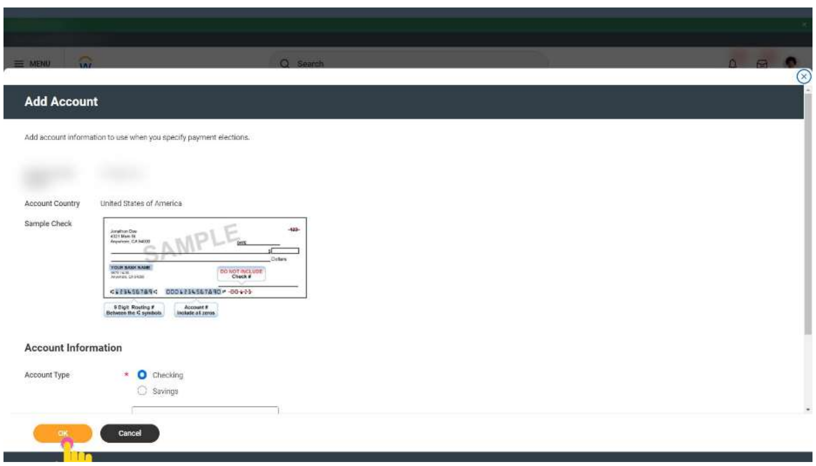
Click Payment Elections



Under your accounts section, you can “Edit”, “Remove”, or “View” your direct deposit account information.

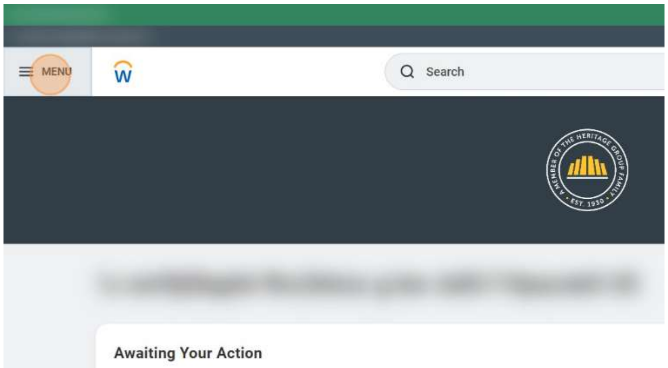


After viewing or updating, click the orange “OK” button to save changes.

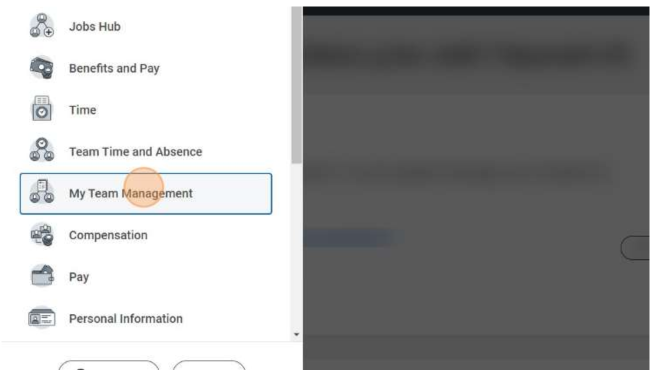


E. Manager Access Team Total Rewards

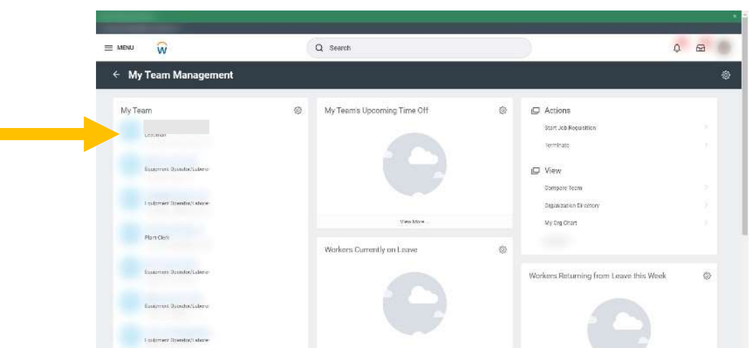
To see your team's total rewards, you'll click on the main "Menu" bottom at the top left of your homepage.



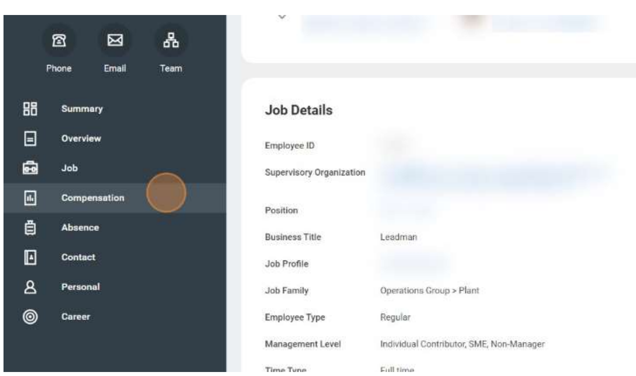
From there, click "My Team Management".



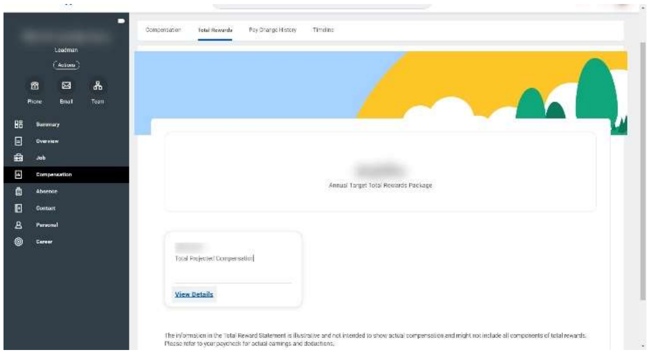
And then click a team member's name from "My Team".



You can then access their "Compensation".



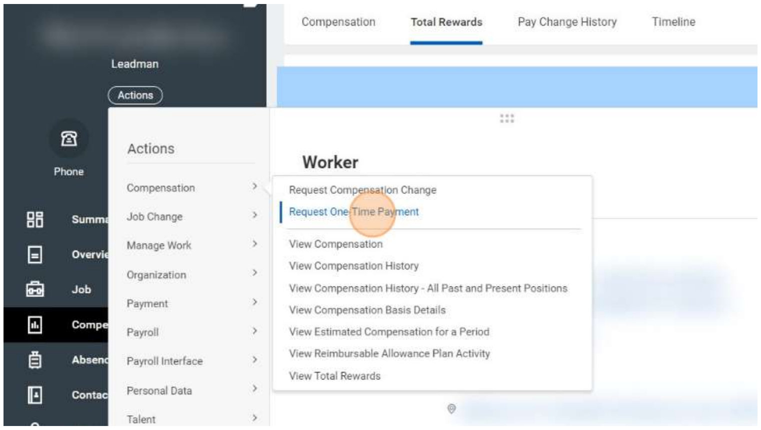
Click “View Details” to see their total rewards.



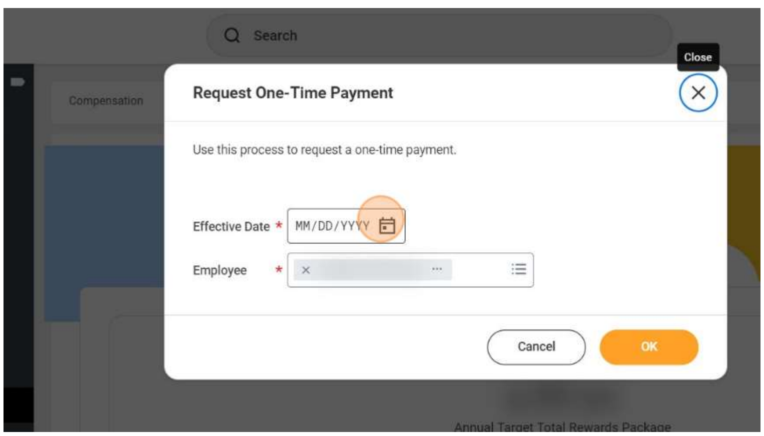
Reminder: only look at pay information for real work reasons and keep all employee data confidential. Misusing this information can lead disciplinary action. If you have any questions or need help, don't hesitate to ask.

F. Manager One Time Payments

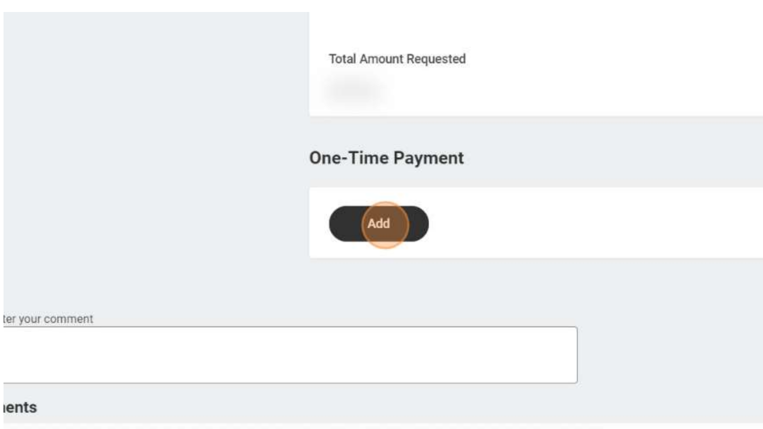
Sometimes you may need to make a one-time payment to employees. To do so from the Employee Record, you'll click "Actions" and then "Compensation" to view all compensation actions that can be taken for an employee. Click "Request One-Time Payment."



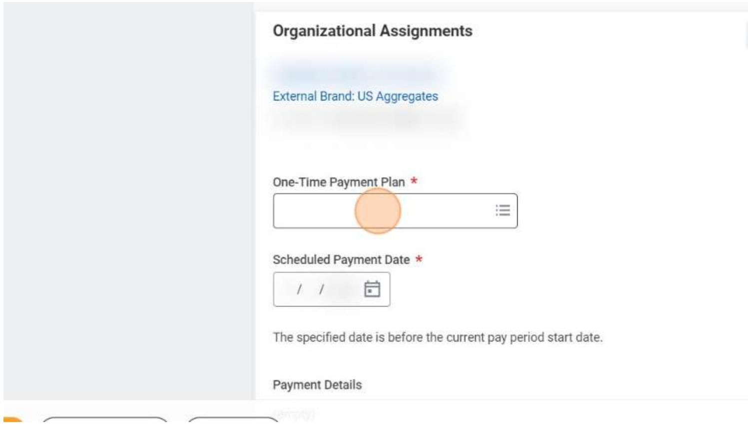
Enter the effective date and then "OK".



Then click "Add".



Choose the appropriate “One-Time Payment Plan” and “Scheduled Payment Date”.



Type in the correct amount, ensure “USD” is the currency, and make sure “send to payroll” is checked. Then click “Submit”. This will send the payment request to the appropriate team member in payroll.